


**A REVIEW OF
MARKETING FLORIDA CITRUS**

CLEVELAND BERMUTH GEER RETTIG



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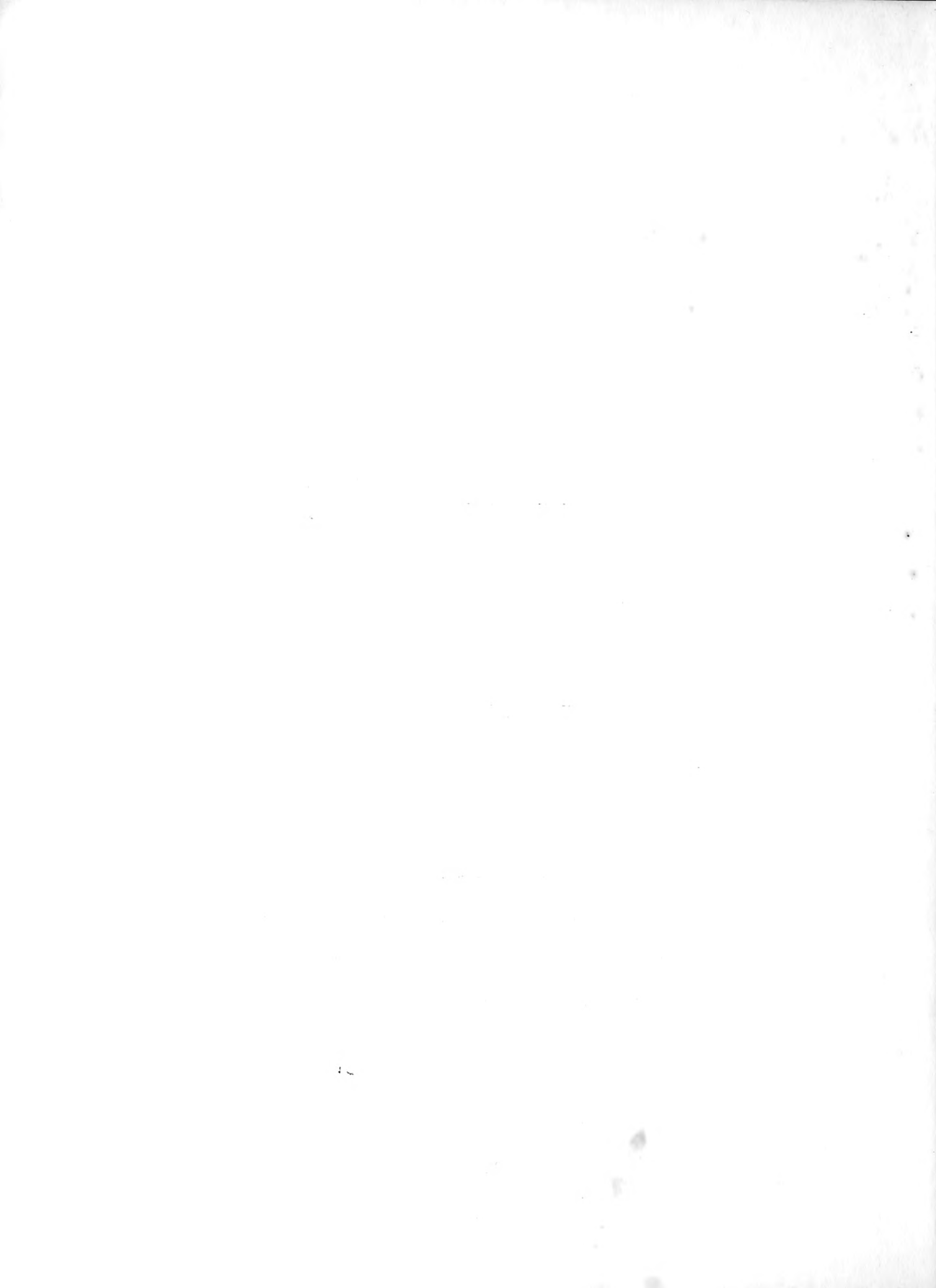
A REVIEW OF MARKETING FLORIDA CITRUS

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CLEVELAND BERMUTH GEER RETTIG

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Submitted in partial fulfillment of the
requirements for the degree of Master of
Arts in the Graduate School of
Florida Southern College



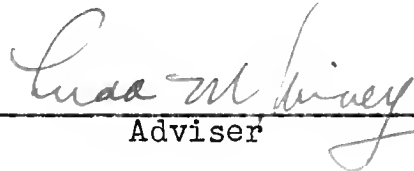
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A REVIEW OF MARKETING FLORIDA CITRUS

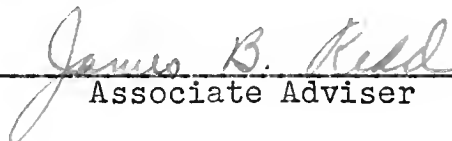
by

CLEVELAND BERMUTH GEER RETTIG

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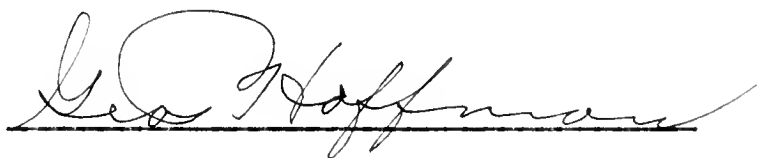
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Date

The undersigned members of the reading committee of Cleveland Bermuth Geer Rettig have examined his thesis, A Review of Marketing Florida Citrus, and recommend its acceptance.

A handwritten signature in cursive script, reading "Geo Hoffman", is written over a horizontal line.

Representatives of the
Graduate Committee

Date of Submission to the
Chairman of the Graduate
Committee

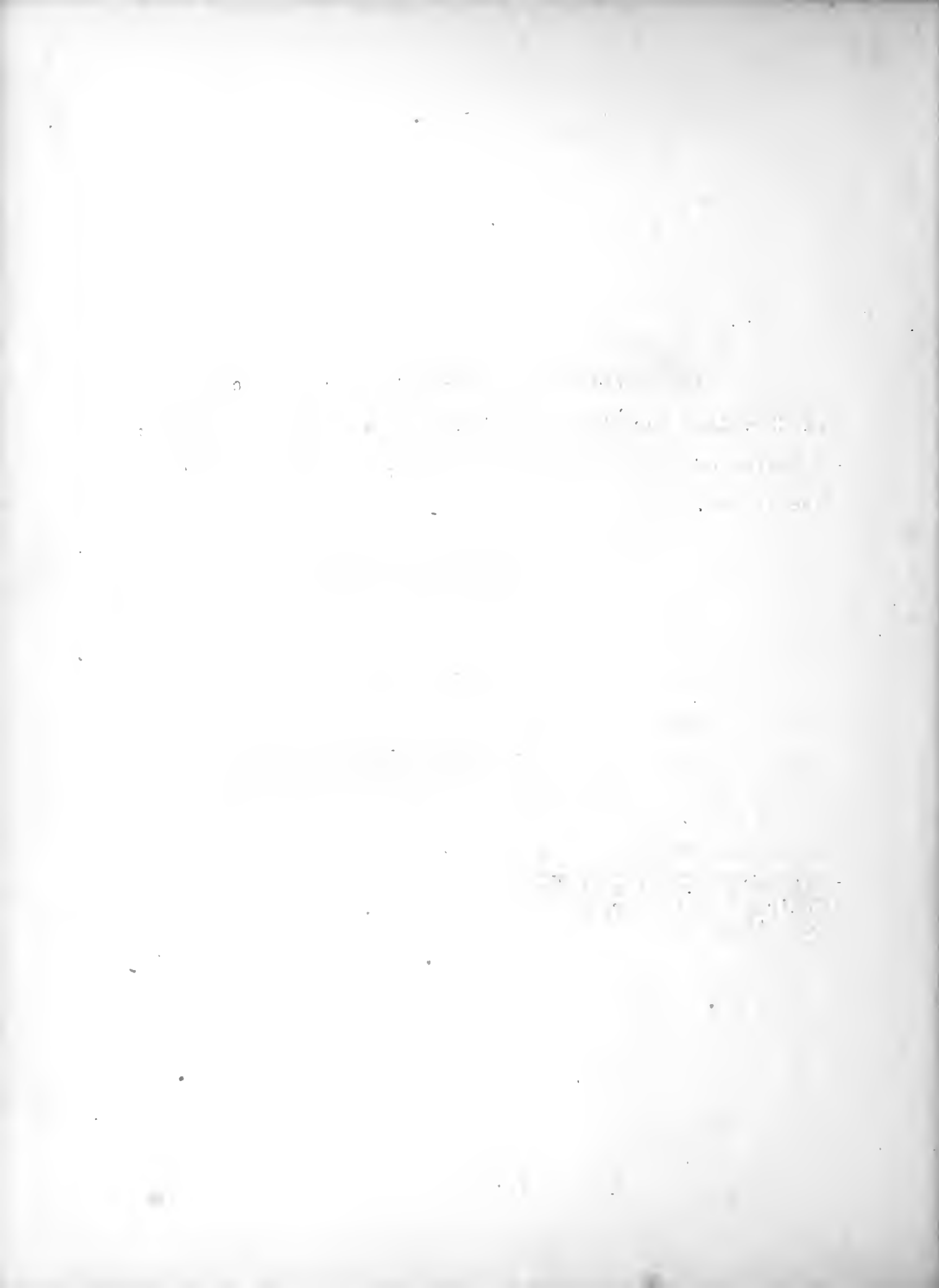
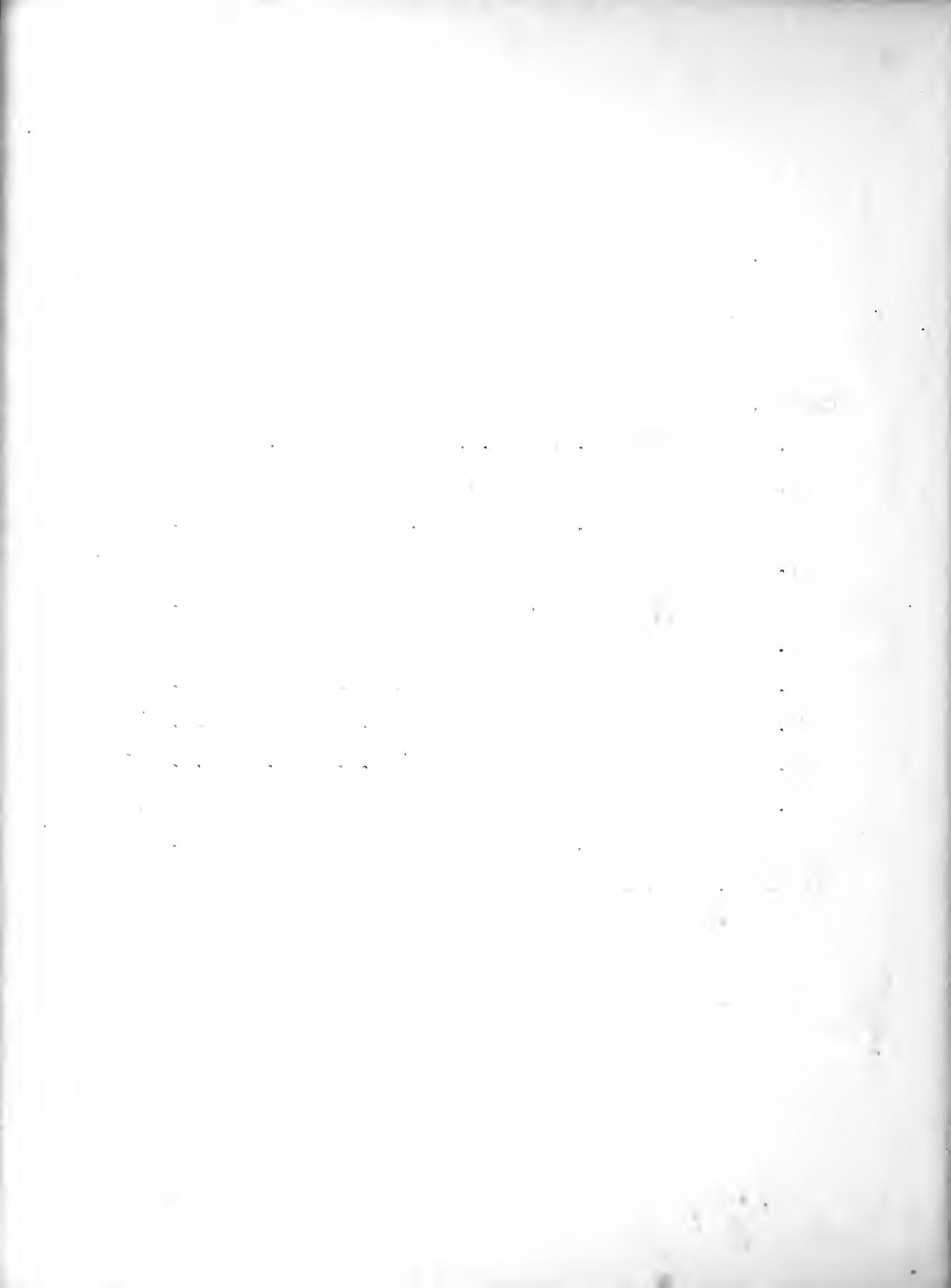


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CHAPTER I

INTRODUCTION

General Statement

The purpose of this investigation is to trace the growth and development of the marketing of Florida citrus and to determine the best methods for solving problems arising in the field.

Specific Problems

In this investigation it will be necessary to consider the following problems:

What is the general purpose of marketing?

How does marketing apply to citrus products in Florida?

What citrus marketing methods have been used over the past years?

How adequate is the present marketing system of citrus?

Does Florida citrus marketing need modernizing?

Is Florida's economic structure one that will encourage modernization of citrus marketing in the state?

What chance has Florida to meet out-of-state competition in the citrus industry using old methods as against suggested new methods?

Definition of Terms

"Marketing citrus products," for the purpose of this investigation, means the act of bringing the product to the consumer as quickly and as economically as possible and at the same time realizing a profit to the grower and intermediary agents.

"Citrus products" means those products which include fresh fruit, canned products, cattle feed, molasses, Vitamin P, soft drinks, chemicals, and fabrics.

"Modernization" means the use of new marketing methods in the citrus industry.

"Florida economic structure" means the financial, labor, and agricultural outlook as applied to Florida's internal development.

Delimitations

This investigation will include the marketing of citrus fruit in Florida during the past forty years, showing what has been accomplished in the citrus marketing field by comparison of the old with the new.

Basic Assumption

Because of the great increase in production, the Florida citrus industry has become a basic economic factor

of the state, requiring planned merchandising and well controlled distribution.

Basic Hypothesis

From the standpoint of the state's economy, there is nothing more important to its development than a profitable reimbursement from Florida's citrus crop and by-products. Whereas the fruit is still sold directly from the trees, much must be done to develop new outlets for the ever-increasing production. From 274,000 boxes during the season of 1899-1900¹ production has expanded to the fabulous figure of 95,570,000² boxes during the season of 1947-1948. With such an increase, the state is presented with the economic problem of either capitalizing on this development or allowing the fruit to waste on the trees. To make the most of increased production the merchandising factor of bringing the product to the consumer as quickly and as economically as possible is accomplished through the use of new marketing methods in the citrus industry.

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1. Florida Department of Agriculture, Citrus Industry of Florida, 1947, p. 11.
 2. Florida Department of Agriculture, United States Department of Agriculture, Bureau of Agricultural Economics, Florida Citrus Fruit, Vol. 1, No. 1, p. 2, December, 1948.

A well planned state citrus economy should include stabilizing production, standardizing quality, developing new outlets, and developing close cooperation among those in the industry.

The Need for the Study

The growing production in the citrus industry demands serious, thoughtful planning toward increased consumer consumption.

This study traces the early growth and development of marketing in citrus, highlighting those stages which led to the present marketing setup. By collecting the data and making a record of marketing progress in the Florida citrus industry, there will be a foundation of facts taken from past experiences upon which to build better marketing methods for the future. Such a study will provide a record of Florida's citrus development as did Teague's book on California's citrus industry.

The fundamental basis of success (in California) has been a willingness on the part of those who have contributed most of the success . . . to work together unselfishly for the common good, without seeking individual advantages at the expense of others cooperating in the undertaking.³

3. Charles Collins Teague, Fifty Years a Rancher, p. 112.

Incidence of the Problem

It has been found that the seller and the purchaser of Florida citrus need a more complete understanding of the historical factors, including the development of transportation, cooperatives, production, and federal and state marketing control. A fuller knowledge of these factors will help those interested to achieve a more complete understanding of the economic problem confronting the citrus industry today.

Related Literature

In reviewing the available literature on citrus the following is outstanding in the marketing field:

Florida Grower, Vol. VI, No. 5, May 4, 1912 to Vol. LVI, No. 12, December, 1948.

This periodical started out as a weekly, changing with Vol. XXXV, No. 10, March, 1927, to monthly issues. A special index has been compiled containing "Supplementary marketing material found in the Florida Grower" which forms a basic outline for the historical data found in this thesis on marketing events in Florida citrus.

The Packer, New York Edition, New York, Vol. XLVIII, No. 8, January 17, 1948 (weekly), Vol. XLIX, No. 12, February 19, 1949.

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As the outstanding agricultural weekly newspaper, The Packer offers a current summary of the leading citrus developments in the United States.

The New York Daily Fruit Reporter, New York, Vol. 40, No. 207, October 27, 1947 (daily), Vol. 42, No. 43, March 3, 1949.

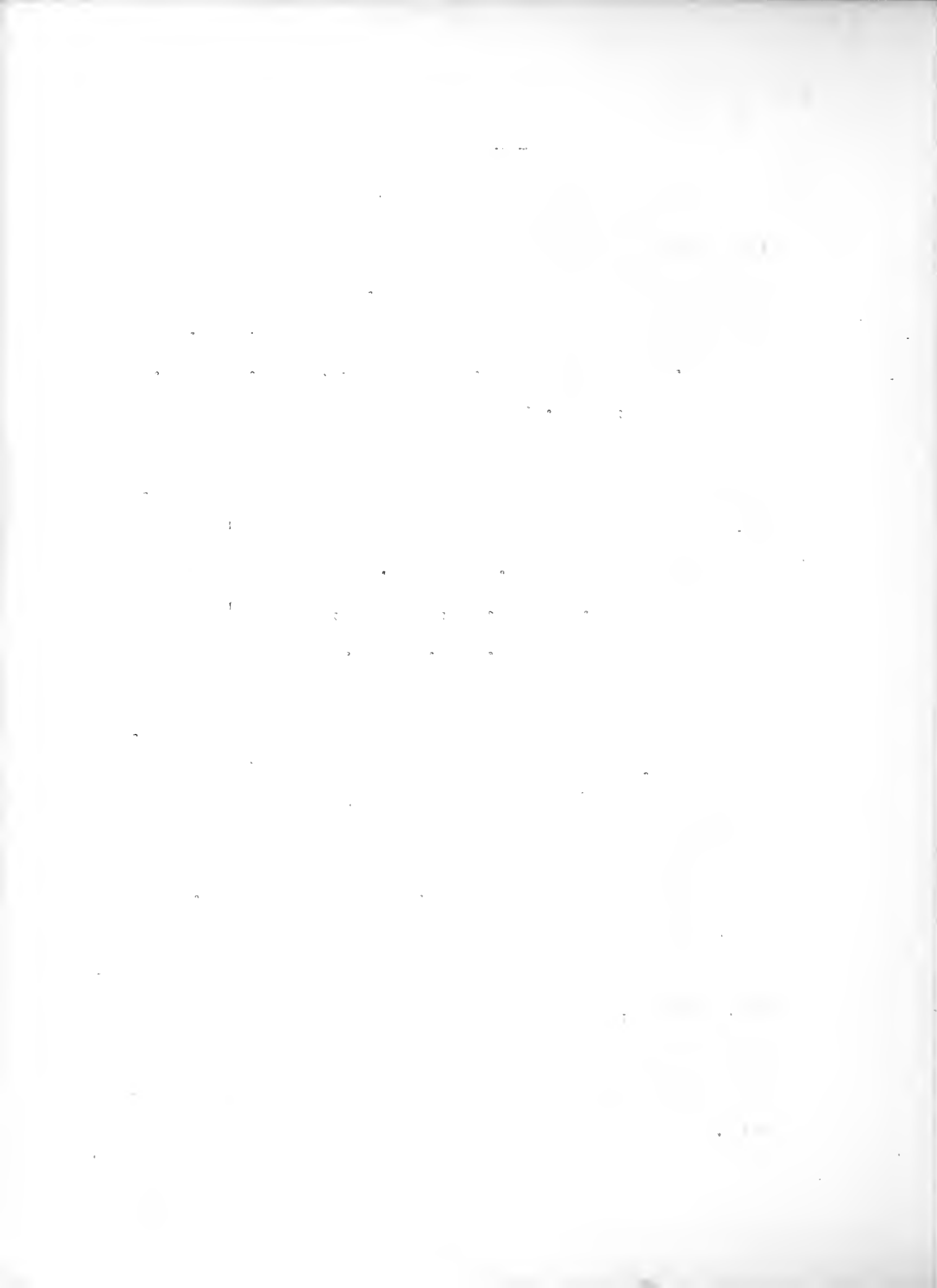
The above is a daily trade bulletin giving current New York auction prices of all agricultural products.

St. Louis Daily Market Reporter and Merchants' Exchange Price Current, No. 170, Vol. 81, October 29, 1947 through No. 4, Vol. 83, March 4, 1949, O'Connor Market Reporter Co., St. Louis.

This is a daily trade bulletin giving current auction prices of all agricultural products in the St. Louis area.

Federal-State Market News Service Citrus Report, United States Department of Agriculture Production and Marketing Administration, Lakeland, Florida.

This report gives a daily summary of average car load and truck shipments of citrus from Florida, California, Arizona, and Texas to the leading auction markets in the United States and also gives average market prices on citrus in the ten leading metropolitan auction markets.



Webber, H. J., and Batchelor, L. D., Citrus Industries.

Berkeley: University of California Press, Vol. I, 1947, p. 1028, Vol. II, 1948, p. 933.

Whereas Vol. I and Vol. II of this book contain basic knowledge for all those interested in the citrus industry, it offers but little scientific information of the history and development of citrus marketing.

Vol. II is a treatise on citrus culture.

Teague, Charles Collins, Fifty Years a Rancher. Los Angeles: Anderson & Ritchie, The Ward Ritchie Press, 1944, 1-199 pp.

In this book Teague gives a well balanced resume of fifty years of progress in the citrus industry of California. By a close study of these problems with their solutions examples were set forth which could be applied to Florida's industry.

Lagner, J., Citrus Fruits World Production and International Trade. Lakeland: Florida Citrus Commission, 1947, 349 pp.

This report is a compilation of letters and statistical data obtained from those interested in Post World War II consumption of Florida citrus.

The review of literature was continued until the additional reading seemed to contribute very little new

material, consequently it was felt that the field was quite substantially covered.

Procedure in Collecting Data

The data were secured principally from research work done in conjunction with Dr. E. F. Hopkins and K. W. Loucks⁴ at the Florida State University Experiment Station, Lake Alfred, Florida, through organization work done with reference to a proposed Florida Southern College Citrus Conference, through information gathered during recent research trips to England and Continental Europe, and through facts obtained in assisting in the organization and operation of Florida Citrus Associates, Inc.

4. E. F. Hopkins and K. W. Loucks, "The Use of Diphenyl in the Control of Stem-end Rot and Mold in Citrus Fruits," The Citrus Industry (October, 1947), pp. 5-9.

CHAPTER II

THE PROBLEM OF MARKETING CITRUS FRUIT IN FLORIDA

The problem of marketing Florida citrus requires a general understanding of economics. Consideration must be given to all the phases of marketing, including buying, selling, transportation, and those factors essential to marketing which include supplying capital, assuming risk, establishing grades and standards, providing storage, and furnishing information about both goods and markets. Each one of these phases of marketing is a business within itself, requiring specialists to handle each particular line.

The fundamental function of marketing, to which all others are subsidiary and supplementary, is selling, which involves transfer of ownership rights from seller to buyer. In some markets only such legal rights are bought and sold, the physical commodity itself may be stored in distant warehouses and merely be represented by sample. In some cases it may not even be in existence at the time of sale. At times that which is sold may represent an equity in near or remote properties. And then again, the goods to be transferred may be physically present in the market, as they are in most retail stores. Selling involves agreeing upon a price with the buyer at which transfer of title to the goods may be made. It is such transactions of the market, involving the transfer of ownership rights at a price, that most deeply concern the economist, since they provide him with his fundamental unit of investigation. To explain the prices that come to prevail in market transactions is a large part of the economist's task. To effect sales of advantageous prices men have created an elaborate marketing technique, including personal salesmanship and advertising, designed to convince and persuade the buyer. Goods do not usually sell themselves,

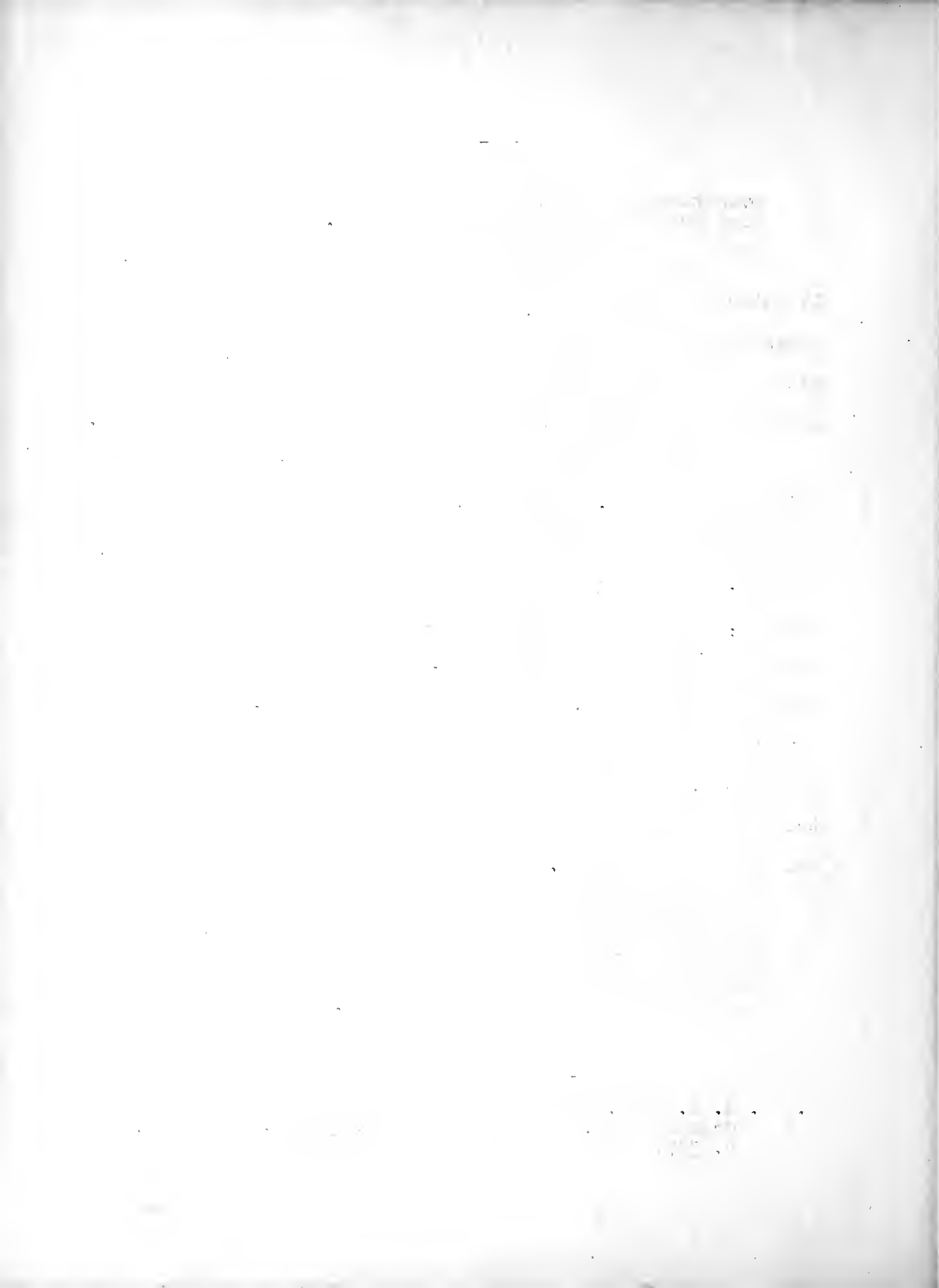
even though a good product is essential for the long-term success of any selling campaign.¹

Inasmuch as the Florida citrus industry is vitally interested in marketing its fruit and by-products, it is necessary for the seller to do everything possible to develop a constant market for his goods at a price which will guarantee production costs plus a reasonable margin of profit.

An important factor to be considered is the assembling of the goods. Generally, this is the duty of the middleman who acquires control of the goods for the purpose of sale. The independent packing house owners, the fruit brokers, and the fruit truckers who buy and sell are the middlemen in the citrus industry. When these men acquire control of the fruit, they assemble it for sale. This may involve only the simple process of buying the product from the packer, or purchasing the fruit while it is still on the tree and carrying it through the necessary steps required to get it to the consumer.

The term assembling does not mean the actual physical transportation of commodities from one place to another, but rather the seeking out of sources, the making of business connections whereby commodities may be bought, and the study of market conditions so that they may be bought at the lowest price possible. Assembling there-

1. L. H. D. Weld, "Marketing Functions and Mercantile Organization," American Economic Review, VII (1917) p. 307.

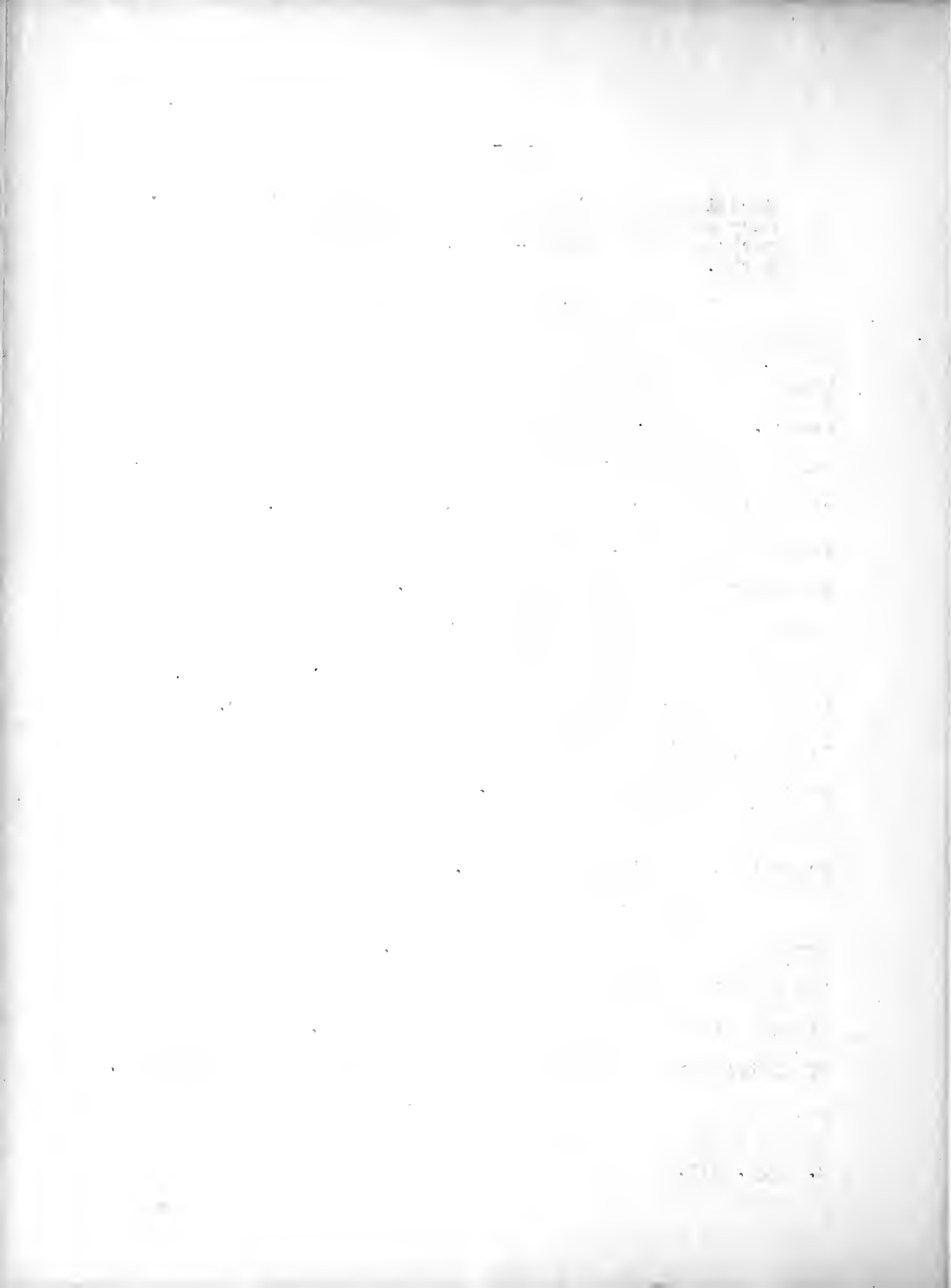


fore involves all the service connected with buying. Many wholesale houses assemble goods from different parts of the country - even from all corners of the earth.²

To get the fruit to the consumer in good condition, standardization (grading or rearrangement) of the goods, that have been assembled by the grower or middleman, is necessary. There are certain requirements set up by the middleman and the consumer which are the result of years of experience in the marketing of fruit. For example, when citrus was first marketed, it was transported from the seller to the buyer in barrels lined with moss. Now the common procedure is to ship the fruit in baskets and boxes of certain dimensions and made of stipulated materials. Standards for these dimensions and materials are set by the trade, or rather by what the trade has learned from experience over years of transacting business. Standardization facilitates the marketing of goods without the goods being physically present at the time of the sale.

There is also the necessity of getting the fruit from the grower to the final consumer. During World War II the United States armed forces enjoyed fresh and canned Florida citrus in all theatres of operation. The problem of distribution requires excellent transportation facilities.

2. Loc. cit.



Good storage is necessary in the form of warehouses, refrigerated railroad cars, steamships, and trucks. Transportation needs equipment to handle fresh, canned, and concentrated citrus. Good transportation and storage facilities would make it possible to transport fresh and canned Florida citrus products to all world markets. These markets could only be developed through the utilization of the most modern transportation facilities. Through an understanding of this problem and use of modern methods the industry can avail itself of all its marketing potentialities. Few goods pass directly from the producer to the consumer and, in the case of Florida citrus, the problem of bringing the seller and buyer together is of utmost importance because of the deterioration of the fruit in transit and the geographical position of the state to its markets. Florida is nearer its markets than California, but the fruit grown in Florida does not have the holding quality of California's fruit. Therefore Florida's product requires better care en route to its final destination.³

Risk-taking and financing are determining factors in the business of marketing Florida citrus. The risk involved in marketing fresh commodities includes all the hazards from the time the fruit is packaged until it is consumed.

3. E. F. Hopkins and K. W. Loucks, "The Use of Diphenyl in the Control of Stem-end Rot and Mold in Citrus Fruits," The Citrus Industry (October, 1947), pp. 5-9.

From the time the fruit leaves the tree until it reaches its final consumer, someone or some group must assume the financial burden. The more circuitous the marketing process, the greater the risks and financial costs involved.

The organization and process of modern marketing are bewildering to those uninitiated in their details. It is comparatively easy to visualize and understand the primary production of goods on the farm . . . and also the final delivery of goods to the consumer. But there is a vast and complicated organization that functions between. Retail merchandising is today done through general stores, department stores, specialty shops, chain-stores, mail-order departments of large retail establishments, regular mail-order houses and directly by . . . producers themselves. Behind them stand many types of wholesale merchants (sometimes called jobbers), commission merchants, manufacturers' agents and brokers, finance houses and agencies, railway transportation, trucking, and shipping agencies, storage companies, delivery services and many more. Those who do not understand their functions very well are apt to denounce many of these agents as unnecessary and the chief reason for the high cost of goods to the final consumer. Experts in the field of marketing are ready enough to admit that there is much waste and inefficiency, but they rightly insist that the basic functions of marketing are as indispensable as the primary production of goods.⁴

By arriving at a better system of marketing of her citrus production, Florida could stabilize her status in the national economy. To accomplish this, it would be necessary

4. William H. Keikhofer, Economic Principles, Problems, and Policies, pp. 390-391.

to organize every step from producer to consumer to develop all of Florida's resources to the full extent of their possibilities.

In 1909 the Florida Citrus Exchange was organized as a cooperative.⁵ Its purpose was to bring about better teamwork between the Florida growers. As Florida's citrus production increased and the national economy became affected by financial depressions and the aftermath of two world wars, Florida's citrus industry needed a more closely controlled marketing system.

The Florida Citrus Exchange seemed to be the answer to the problem in the early years of the industry's development. In 1948-1949 the Florida Citrus Mutual appeared to be the modern solution to the same marketing problem which faced the industry in 1909. Citrus was still being over-produced and under-marketed. In Article II of the Amended Articles of Incorporation of Florida Citrus Mutual these apparent needs have been set forth as follows:

To promote and provide a medium for the cooperative unity of effort by producers of citrus fruit in the handling and marketing of some and any and all derivatives and products thereof; . . .

5. University of Florida, Florida Agricultural Experiment Station, Bulletin 245, Farmers' Cooperative Associations in Florida, I. Status and Legal Phases, Marvin A. Brooker and H. G. Hamilton, 1932, p. 8.

To provide the facilities and agencies through which Florida citrus fruit produced and/or handled by its own members and non-member patrons and the by-products thereof, may be marketed advantageously throughout the United States and other countries through establishing a stable and systematic flow and distribution of such fruit; to encourage through collective action, a better and more economic method of production of Florida citrus fruit; to promote and secure a better texture, grade and pack of citrus fruit; to promote, engage in and secure a uniform and effective method of advertising Florida citrus fruit; to promote and secure a more adequate method of regulating and stabilizing the citrus fruit industry to meet the consumptive demands thereof; to enlarge and extend the domestic and foreign markets for Florida citrus fruit; to cultivate and develop a more thorough understanding of mutual interests among producers of Florida citrus fruit.⁶

In 1947 the Florida Citrus Commission realized the need for more post war outlets and, through the Growers' Administrative Committee and Shippers' Advisory Committee, sponsored a research report entitled Citrus Fruit - World Production and International Trade, which pointed out the foreign sales potentialities for Florida's citrus.⁷

A survey was made of European markets during the fall of 1947 and again in the spring of 1949, for the purpose of analyzing the market potentialities for citrus in

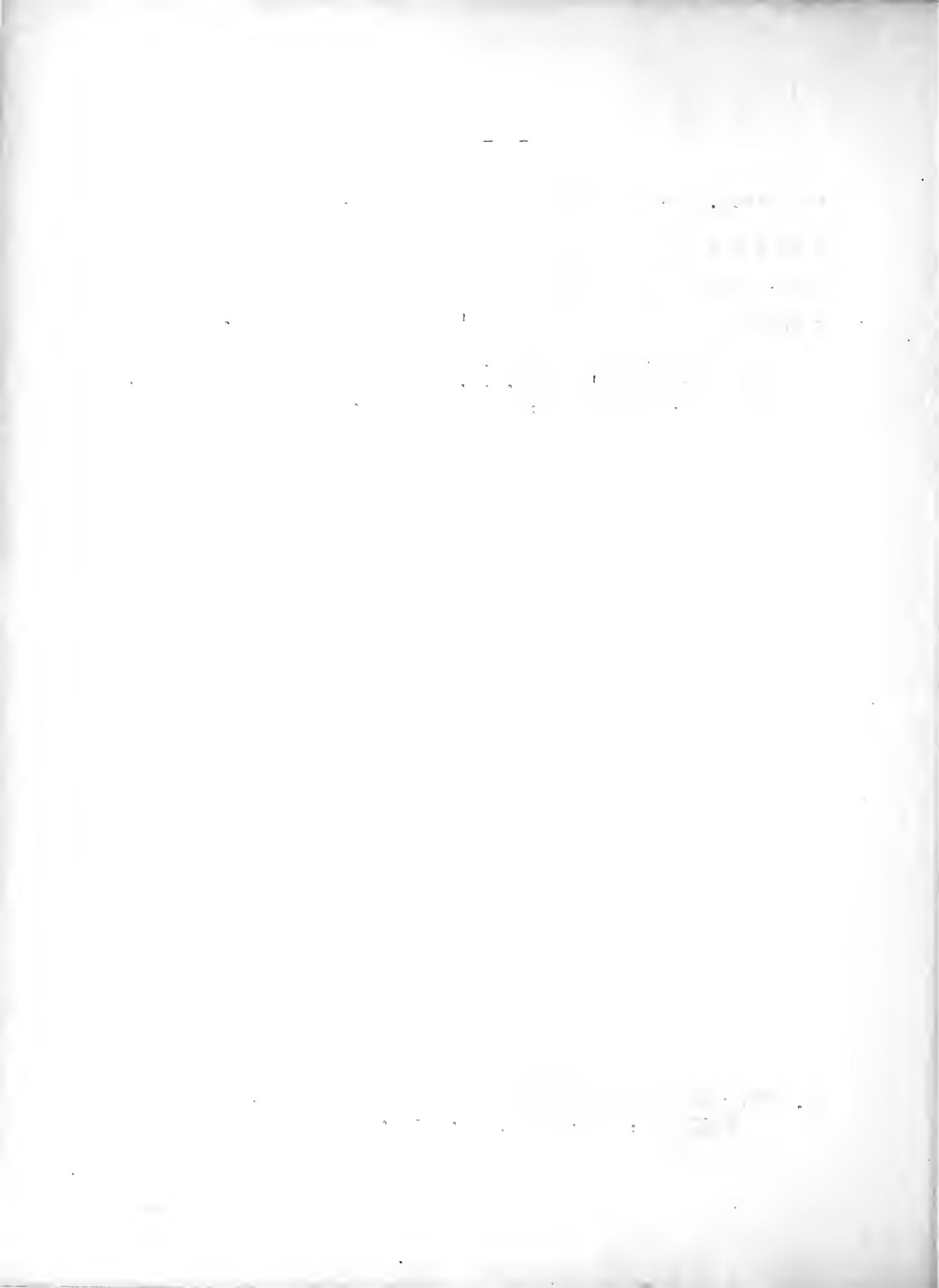
6. Florida Citrus Mutual, Charter By-Laws. Lakeland, Florida, June 15, 1948, p. 1.

7. J. Lagner, Citrus Fruits World Production and International Trade.

that area. As a result of this analysis, it was found that with the assistance of the Economic Cooperation Administration, the European buyer was in a position to purchase a substantial portion of Florida's citrus production.

Generally speaking, food items form the bulk of the first year's aid . . . fresh fruit (apples, pears, oranges, grapefruit, bananas) . . . ⁸

8. "How to do Business Under the Marshall Plan," Kiplinger Magazine, May, 1948, pp. 5-16.



CHAPTER III

THE DEVELOPMENT OF MARKETING METHODS IN FLORIDA

Florida citrus production has been steadily growing since the season of 1899-1900 when 274,000 boxes¹ were produced as against 95,570,000 boxes² during the season of 1947-1948. These figures will be steadily climbing due to the great amount of new groves planted from profits made during the war years.

The problem facing the Florida citrus industry today is not one of production, but rather one of marketing its product. Marketing has now assumed an outstanding importance in the citrus business. Its functions are not simple, but in the present economic setup are very complicated and demand intelligent thinking, logical reasoning, and practical application.

Present Day Marketing in Florida

The marketing of Florida's yearly citrus crop is not the same problem today that the early growers faced at the turn of the century. It is not even the same problem

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1. Florida Department of Agriculture, Citrus Industry of Florida, p. 11.
 2. Florida Department of Agriculture, United States Department of Agriculture, Bureau of Agricultural Economics, Florida Citrus Fruit, Vol. 1, No. 1, December, 1948, p. 2.

the industry was faced with a few years ago. The Florida citrus industry, like many others throughout the United States, has set a goal of high production, but unlike most other great industries, the marketing of Florida's citrus products has not kept pace with the production. Somewhere along the way Florida's citrus industry neglected to organize a sound marketing program for the amount of citrus that is unloaded on the market each year. Florida is not alone in her slow marketing development. Few detailed and comprehensive studies have been made on improving methods of distribution. Generally, the field of distribution has been neglected. More emphasis has been placed on production. Two great wars in a period of thirty years have caused an enlarged market for all products. After the first World War the starving people of Europe needed almost everything, consuming much of the surplus goods of the United States. As their condition improved and this market decreased, the unimproved marketing machinery could not efficiently distribute the quantities of material resulting from this expansion. The Florida citrus industry had developed its production from 8,400,000 boxes of citrus in 1913-1914 to 13,900,000 boxes in 1919-1920.³ The needs of the war years had consumed

3. Florida Department of Agriculture, Citrus Industry of Florida, p. 12.

this increase through government purchases. When the war emergency period came to an end it was necessary for Florida to find new channels of distribution.

The national situation of over-production resulted in the depression of the 1930's. People were forced to realize the need for a sound method of distribution. There was no question that there was a need for everything that was produced, but that there was a definite need for better marketing methods, just as there had been a need for better methods of production. Distribution costs had been steadily rising and almost fifty cents of the consumer's dollar was used to pay for the marketing costs of most goods.

One of the most widespread and persistent ideas in regard to business cycles is that they are due to overproduction, or if one wishes to change the emphasis, to underconsumption of goods. Older forms of the theory of overproduction stressed production as increasing faster than the power of consumers to take goods out of the market. Such general overproduction, it was held, led to a glut in the market and an economic crisis . . . What is now usually meant by overproduction, however, is not general overproduction, but rather unbalanced production in an economic world in which most producers specialize . . . The important question is, "How did supply and demand in so many markets get so badly out of balance?"

There can be no doubt that every depression reveals such misdirected or unbalanced production. The difficulty of gauging the absorptive capacity of the market and the further fact that much production must be carried on in anticipation of future demand help to account for what prove to be mistakes of judgment. While

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describes the general situation
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2. The second part of the report
describes the economic situation
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3. The third part of the report
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4. The fourth part of the report
describes the political situation
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5. The fifth part of the report
describes the cultural situation
of the country.

6. The sixth part of the report
describes the environmental situation
of the country.

7. The seventh part of the report
describes the international situation
of the country.

unbalanced production is a characteristic of every depression, it offers no explanation of why production periodically becomes unbalanced.⁴

Because of the fact that most of the consuming public thought of oranges as a luxury fruit, Florida's second largest industry felt the depression of the 1930's very keenly. The depression caused the consumers to cut down on household expenses and to concentrate their spending on what they considered more staple foods. In order to combat this negative buying attitude, Florida endeavored to sell the public on the healthful quality of its citrus fruits. This was, to all appearances, a good selling argument, but public opinion could not be changed over night and citrus continued to feel the depression.

Although research in marketing methods had actually been started about 1912, it was not until the depression of the 1930's that it grew to sizable proportions. It was at this time that marketing research firms and merchandising counselors came into their own.⁵

The market may be improved at many points by means of research. Research plays an important part in determining the most efficient method of marketing practically all goods available today. Scarcely a market function can be named, the performance of which could not be improved by scientific research. Knowledge of the best selling methods, that is, best from the stand-

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4. William H. Keikhofer, Economic Principles, Problems, and Policies, p. 619.
 5. Myron S. Heidingsfield and Albert B. Blankenship, Market and Marketing Analysis, p. 4.

1. The first part of the paper is devoted to a general discussion of the problem of the existence of solutions of the system of equations

$$\frac{dx}{dt} = f(x, y, z), \quad \frac{dy}{dt} = g(x, y, z), \quad \frac{dz}{dt} = h(x, y, z),$$

where f, g, h are continuous functions of x, y, z and satisfy the conditions

$$f(0, 0, 0) = 0, \quad g(0, 0, 0) = 0, \quad h(0, 0, 0) = 0,$$

and the functions f, g, h are bounded in a neighborhood of the origin.

It is shown that

$$\lim_{t \rightarrow \infty} x(t) = 0, \quad \lim_{t \rightarrow \infty} y(t) = 0, \quad \lim_{t \rightarrow \infty} z(t) = 0,$$

if the functions f, g, h satisfy the conditions

$$f(x, y, z) \leq -\alpha(x^2 + y^2 + z^2), \quad g(x, y, z) \leq -\beta(x^2 + y^2 + z^2), \quad h(x, y, z) \leq -\gamma(x^2 + y^2 + z^2),$$

where α, β, γ are positive constants.

The second part of the paper is devoted to a study of the stability of the solutions of the system of equations

$$\frac{dx}{dt} = f(x, y, z), \quad \frac{dy}{dt} = g(x, y, z), \quad \frac{dz}{dt} = h(x, y, z),$$

where f, g, h are continuous functions of x, y, z and satisfy the conditions

$$f(0, 0, 0) = 0, \quad g(0, 0, 0) = 0, \quad h(0, 0, 0) = 0,$$

and the functions f, g, h are bounded in a neighborhood of the origin.

It is shown that the solutions of the system of equations

$$\frac{dx}{dt} = f(x, y, z), \quad \frac{dy}{dt} = g(x, y, z), \quad \frac{dz}{dt} = h(x, y, z),$$

are stable if the functions f, g, h satisfy the conditions

$$f(x, y, z) \leq -\alpha(x^2 + y^2 + z^2), \quad g(x, y, z) \leq -\beta(x^2 + y^2 + z^2), \quad h(x, y, z) \leq -\gamma(x^2 + y^2 + z^2),$$

point of both consumers and producers may be extended. New and more efficient methods of storing and transporting goods may be discovered. The most advantageous number of sizes, varieties, and styles to be put on the market may be determined. Much needs to be done to determine the most efficient size of business, the most efficient method of management, the best channel of distribution, and the most efficient middlemen.

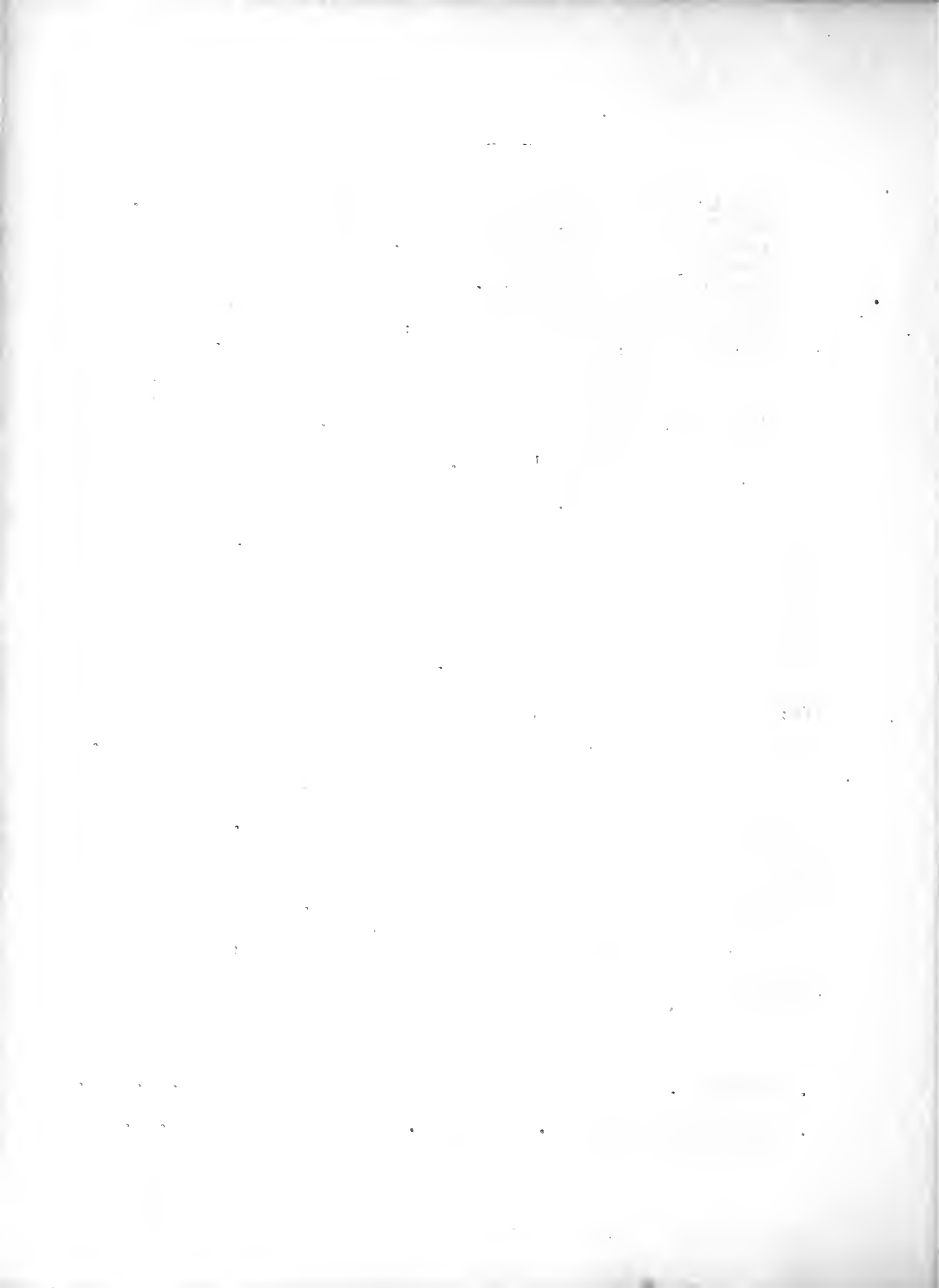
The research activities of producers acting individually and in trade associations have been important in improving the process of marketing. This research should be greatly extended and directed more specifically toward consumers' goods.⁶

Universities, foundations, and other groups turned their attention to the techniques of distribution. During this period many large industrial firms set up their own marketing departments to concentrate on questions of increasing distribution efficiency. The automobile manufacturers, the steel companies, the major food processors - all industrial leaders - were vitally interested in this activity. This was an excellent time for the Florida citrus industry to concentrate on better facilities for distribution. A provision for the Florida Citrus Commission was incorporated in the state laws to help meet this problem.⁷

With the coming of the second World War, the need for better distribution was overbalanced by a quick need for

6. Jessie V. Coles, The Consumer-Buyer and the Market, p. 548.

7. Florida Grower, Vol. XVIII, No. 9, October, 1935, p. 5.



greater production, to supply the armed forces of the United States and its allies, and to take care of its civilian population. At the end of the war it was apparent that another great step forward had been made in national productive capacity.⁸ Even though wartime-devised labor-saving machines and methods had materialized during this period, limited labor supply had given labor organizations an opportunity to secure wage increases for its members to meet the ever increasing cost of living.

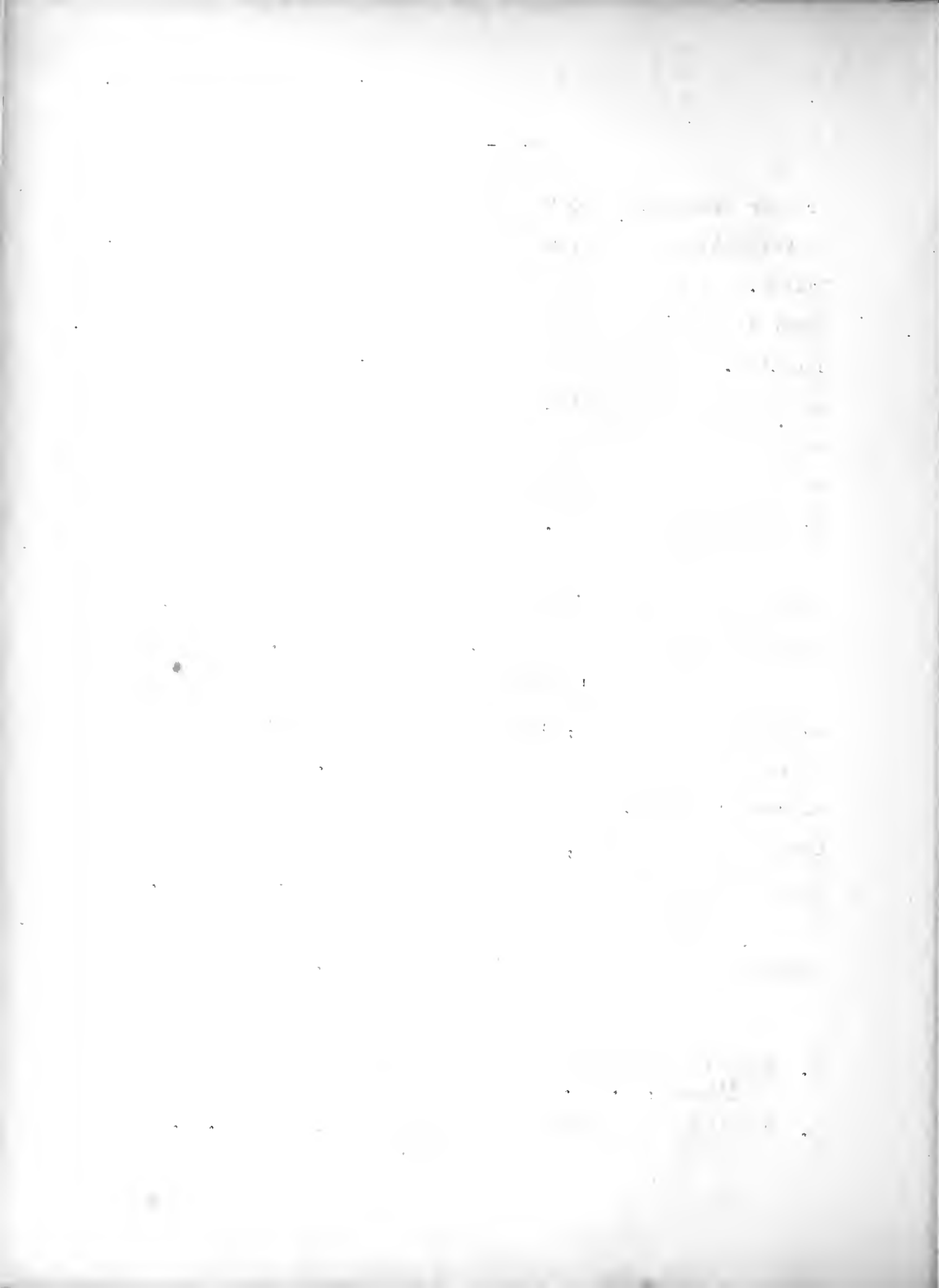
At the end of World War II the United States Government reduced its purchases of citrus and Florida was faced with problems of an enlarged citrus production.⁹

If Florida's citrus industry continues to increase its yearly production, careful study and research will be necessary to control its marketing problem. If prices on citrus products can be reduced by making a careful survey of the marketing problem, more people will buy citrus goods which will help eliminate the problem of over-production.

Current methods of distribution should be reorganized and revamped to meet present needs. If the equation

8. Florida Department of Agriculture, Citrus Industry of Florida, p. 12.

9. Florida Citrus Exchange, Annual Report, 1948, p. 3.



of production and consumption in citrus as well as in all products is to be balanced, the public should be given what it wants, when it wants it, and where it wants it, at reasonable prices.

If this balance between production and consumption is to be reached in the citrus industry today, concentrated effort should be given to the scientific study of marketing. In a country as great as the United States, general prosperity should be continuous. In Florida a continued study of distribution of citrus products will help to do this for the state. By careful market analysis of the citrus problem a more efficient system of distribution and marketing will result. It is only by reviewing past performances as applied to present and future needs that this will be accomplished.



CHAPTER IV

A SURVEY FROM 1909 THROUGH 1919

In 1909 the Florida Citrus Exchange was formed under the Cooperative Law¹ of that year. It was "purely a marketing agency organized by the growers themselves for the purpose of handling fruits and vegetables."²

This cooperative suffered from the suspicion and ridicule of non-members in the industry, and by 1912 was fighting a battle for existence. In defense of criticism from some people in the industry, the Exchange stated:

Whereas, the Florida Citrus Exchange has, in its third year, averaged a higher price for citrus fruits handled by its freight cars, packing houses, than ever has any similar organization handling citrus fruits in America.

Whereas in spite of these results shown by the Florida Citrus Exchange the percentage of the Florida crop of citrus fruits handled by the Exchange has dwindled from year to year, thus leaving the Board of Directors of the Florida Citrus Exchange to feel that the citrus growers of Florida generally do not value at their true worth the services of the Florida Citrus Exchange, the present Board of Directors decided that as the present organization could disband on May 1st with practically no unpaid indebtedness for this year's

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1. University of Florida, Florida Agricultural Experiment Station, Bulletin 245, Farmers' Cooperative Associations in Florida, I. Status and Legal Phases, Marvin A. Brooker and H. G. Hamilton, 1932, p. 34.
 2. "Points About the Florida Citrus Exchange," The Florida Grower, Vol. XVIII, No. 1, July 6, 1918, p. 6.

operations, it would, before disbanding, call an open convention of citrus growers of Florida.³

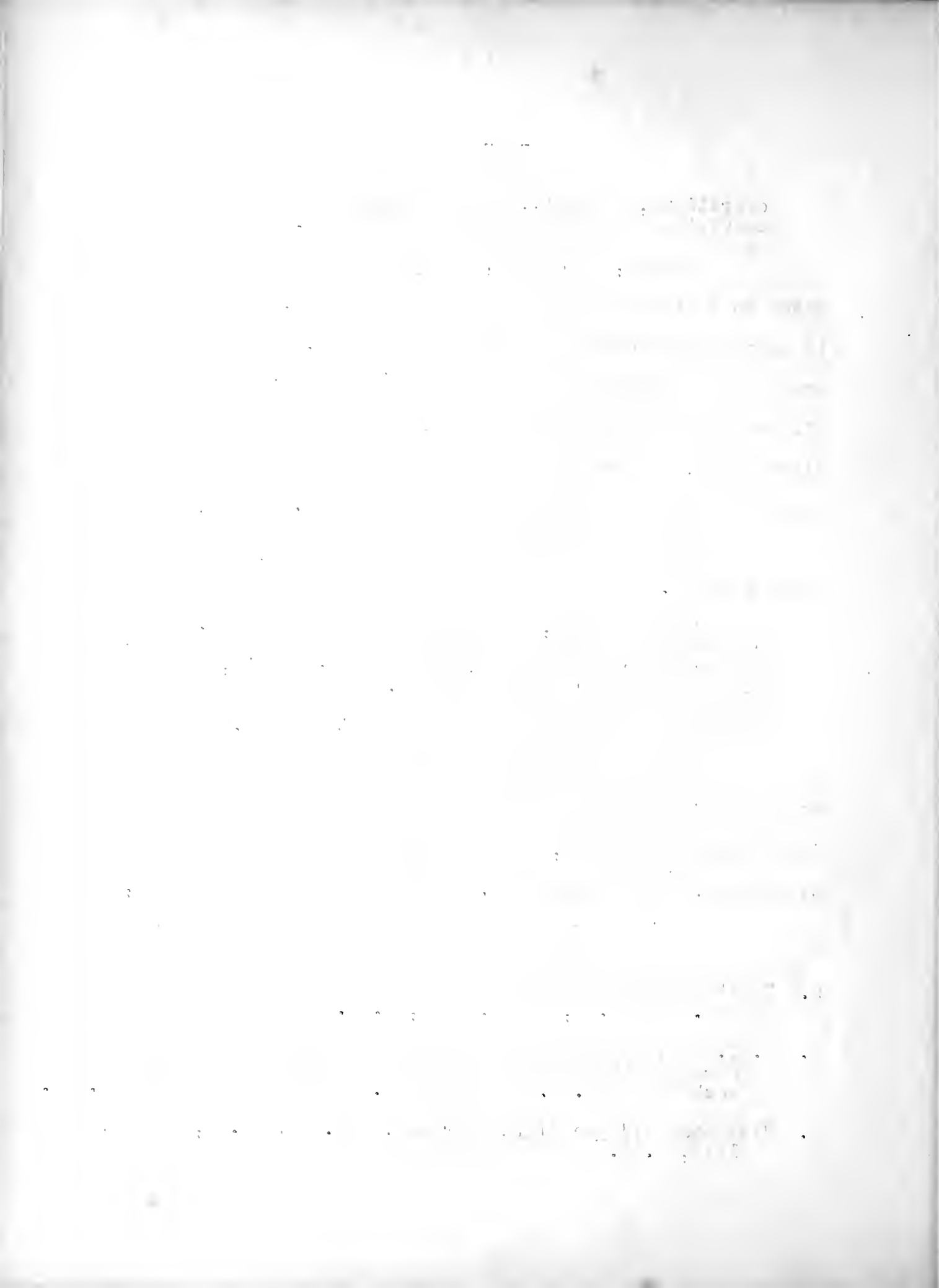
However, on June 4, 1912, it was unanimously decided to continue the Florida Citrus Exchange, the aim being to help local growers in every way possible. At this meeting it was generally decided that pooling should be used by all Exchange members, that contract packing houses should be discouraged, and encouragement should be given to members who wished to build their own packing houses.

During the period from 1909 to 1912 much was said about pooling.

Fundamentally, pooling is a sound practice. It represents a means of paying the same price to different producers for commodities of like variety, grade, and quality over a given period. No organization or individual can consistently sell commodities of equal value at the same price in different markets.⁴

It was suggested that a "Thanksgiving Pool followed by a pool for Christmas fruit and an open season for fifteen days after December 15, during which time no fruit should be shipped,"⁵ be inaugurated. This plan was given a trial,

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3. "What Are You Going to Do About It?" The Florida Grower, Vol. VI, No. 5, May 4, 1912, p. 1.
 4. M. C. Gay, Marketing Fruits and Vegetables Cooperatively, Farm Credit Administration, Cooperative Division, Washington, D. C., Circular No. C-110, August, 1938, p. 39.
 5. "The Lancer," The Florida Grower, Vol. VI, No. 9, June 1, 1912, p. 8.

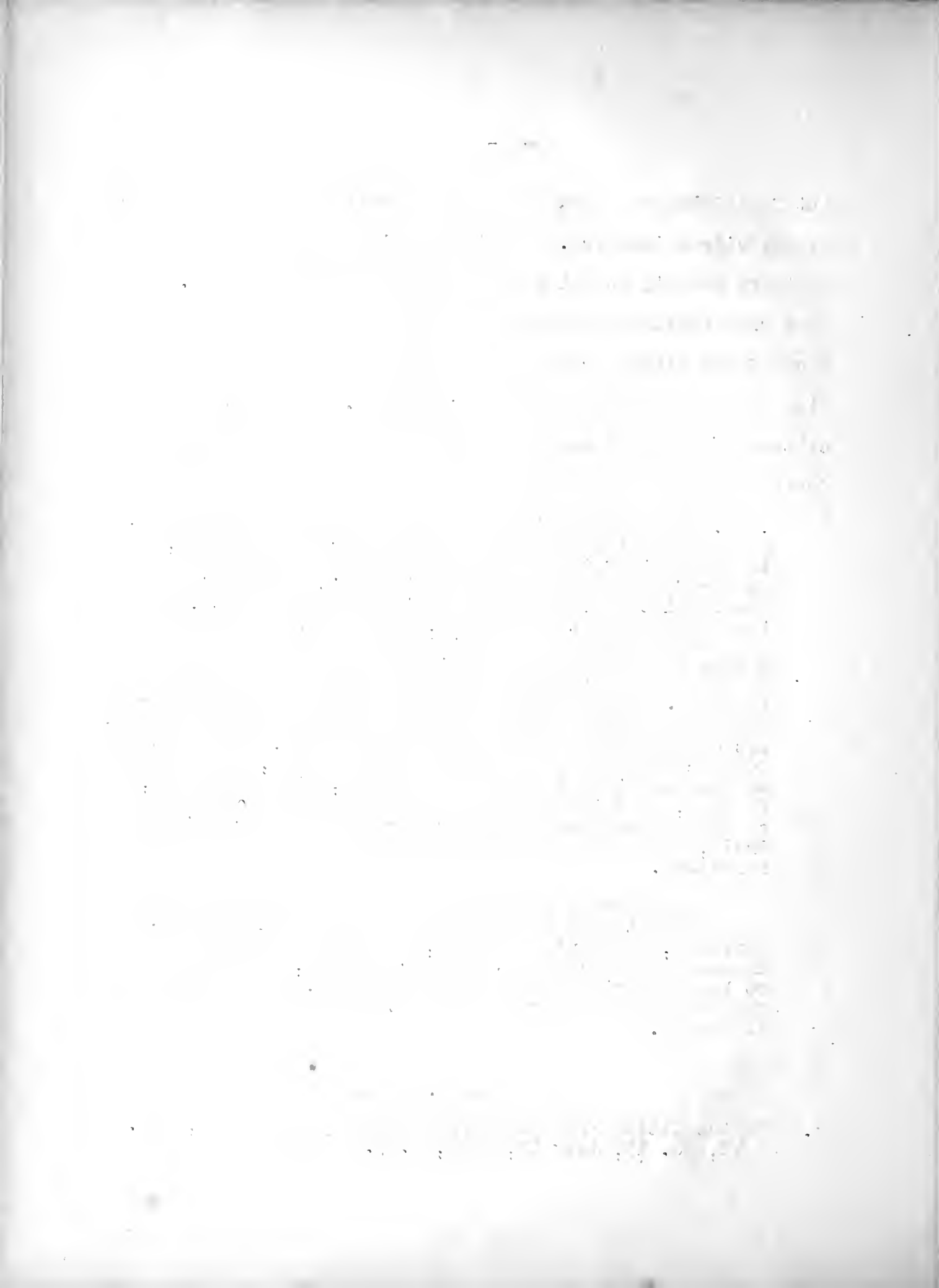


but failed because of a lack of cooperation among the members of the citrus industry. Immature fruit was shipped to the northern markets in spite of the attempt at regulation. This uncontrolled condition resulted in an appeal made by many of the citrus growers to the state government for a plan to assist in managing their problem. The State Agricultural Department believed that a standard for immature fruit should be adopted and

. . . suggested that a commission consisting of Director of the Florida Agricultural Experiment Station, the Chemist of the Agricultural Experiment Station, the Professor of Chemistry of the State University, the President of the State Horticultural Society, and the State Chemist of Florida, be requested to compile all analytical data now obtainable, that of the United States Department of Agriculture, the California and Florida Agricultural Experiment Stations and other reliable data obtainable; and that this standard so agreed upon by this commission be submitted to the orange growers of the State or their representatives, at a meeting to be called at the earliest possible date, subsequent to the report of the said commission, at Gainesville, Florida, at which meeting the report of the commission shall be submitted to the growers and shippers of Citrus Fruit, or their representatives for their adoption or rejection.

Any standard fixed by the growers and shippers of Citrus Fruit will be adopted by the Agricultural Department, as provided by law, for its guidance in the inspection and analysis of Citrus Fruit, and on which to base reports to the proper officers, in the event of the shipment of Citrus Fruit not in accordance with such standards.⁶

6. "To the Citrus Fruit Growers," The Florida Grower, Vol. VI, No. 15, July 13, 1912, p. 7.



These suggestions were received favorably by the majority of citrus growers, although some discussion was raised regarding the representatives at the convention. However, all believed that a committee should be formed and the situation studied. On August 15, 1912, a convention was held at Gainesville, Florida, and the committee's findings were presented to the growers' representatives.

Resolved that it is the sense of this convention that the report of the committee appointed by the Commissioner of Agriculture shall be adopted and shall obtain until the 5th day of November in each and every year; provided, that after the 5th day of November in each and every year the standard shall be that if the area of each orange be two thirds yellow, it shall be considered mature and fit for shipment.⁷

As the fall shipping season of 1912 approached, the grower was confronted with the decision of either abiding by his agreement to hold his fruit until it was mature, or taking advantage of the high prices the northern markets offered for early fruit. The Florida Citrus Exchange asked the shippers to cooperate with the new law and ship only after their fruit passed the new shipping regulations. However, a considerable number of shippers did not comply with

7. "The 'Standard' of the Progressive Growers," The Florida Grower, Vol. 6, No. 19, August 24, 1912, p. 6.

this request. Kansas City reported: "Market demoralized here, grapefruit dealers that have bought lately selling at cost and less, trying to get out . . ."8

A further report stated:

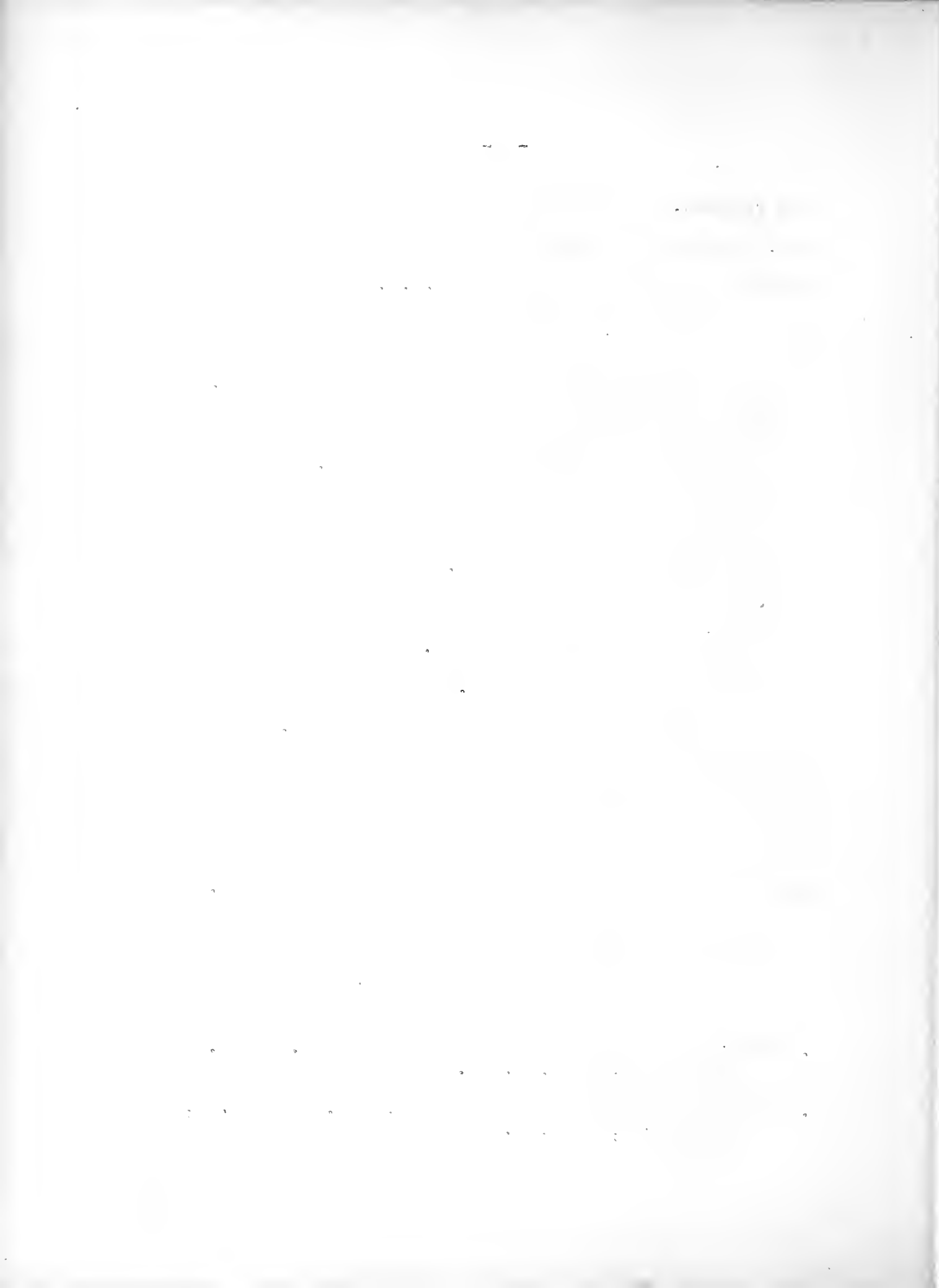
There has been such a heavy output of grapefruit that prices have been much lower than is usual. Some cars have sold for less than freight and packing cost, but in general the price received has been large enough to pay very well for the growing, even if not as large as we have been receiving in the past. One feature is that the consumer has been able to buy grapefruit fairly cheap but the trouble has been that it was largely unripe fruit, so that this feature has not accrued to the benefit of the producer, as it would have done had the fruit been at its best. When cheap fruit is good, and when good fruit is cheap, it often happens that it is really a good thing for all concerned, for more people are tempted to buy in quantity, and a habit, once formed is hard to break. The best kind of advertising is to get good fruit into the hands of the consumer. He will want more.9

Not all the shippers were offenders. The more conscientious growers were making a definite effort to confine their shipments only to mature fruit. Those who were trying to get by the new regulations were being turned in and arrested for their misinterpretation of the law.

Co-operation can unquestionably accomplish more through the savings which producers may realize by con-

8. "Market Letter," The Florida Grower, Vol. 7, No. 4, October 26, 1912, p. 11.

9. "The Lancer," The Florida Grower, Vol. VII, No. 6, November 9, 1912, p. 9.



ducting their own distribution than through increases in the wholesale price obtained. We need a better adjustment of supply to demand which will make it possible to market commodities when and where they will bring the largest net returns.¹⁰

During 1917 the Florida Legislature created the State Marketing Bureau

. . . to help develop Florida by keeping producers and sellers informed as to market centers and as to market conditions in general; by issuing bulletins giving all necessary information in regard to picking, grading, packing, shipping and inspection, and by bringing the buyer and seller closer together, and doing all that can be done to systematically and scientifically mark and distribute Florida products, and thereby increase her income and develop her greatest resource, her agricultural interests.¹¹

The United States was then at war and all food prices were rising. The old law of supply and demand was doing the regulating. A resume of the market conditions of the period is shown in the following:

What the public will pay for ripe fruit is shown by the prices now being paid for California Valencias, and, by the way, the California Valencia is, . . . going to solve our vexed problem of immature orange shipments . . . The ever-increasing quantities of Valencias raised in California has made the supply such that it will nearly equal all demands for oranges up to Thanksgiving Day, and it is no use to expect the public to buy green and sour oranges from Florida when ripe

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10. "Co-operation Can Save \$225,000,000," The Florida Grower, Vol. VII, No. 7, November 16, 1912, p. 8.
 11. "The Relation of the State Marketing Bureau to the Development of Florida," The Florida Grower, Vol. XVI, No. 19, November 10, 1917, p. 7.

and juicy oranges from California may be had. This supply from California does not yet fill all the demand, as otherwise the price would not be up to \$6 and \$7 a box at this time, but the promise is that it will in later years, and Florida's very early fruit market will be knocked in the head insofar as sour and green stuff is concerned. Holding back her oranges through November, Florida should find a splendid market through December and January, for with no sour balls to work off, the trade will be eager for Florida fruit; fruit that is right and fit to eat, and her only American rival will be northern California, which sends a rather limited quantity of navels to market through December, this fruit going very largely to western markets.¹²

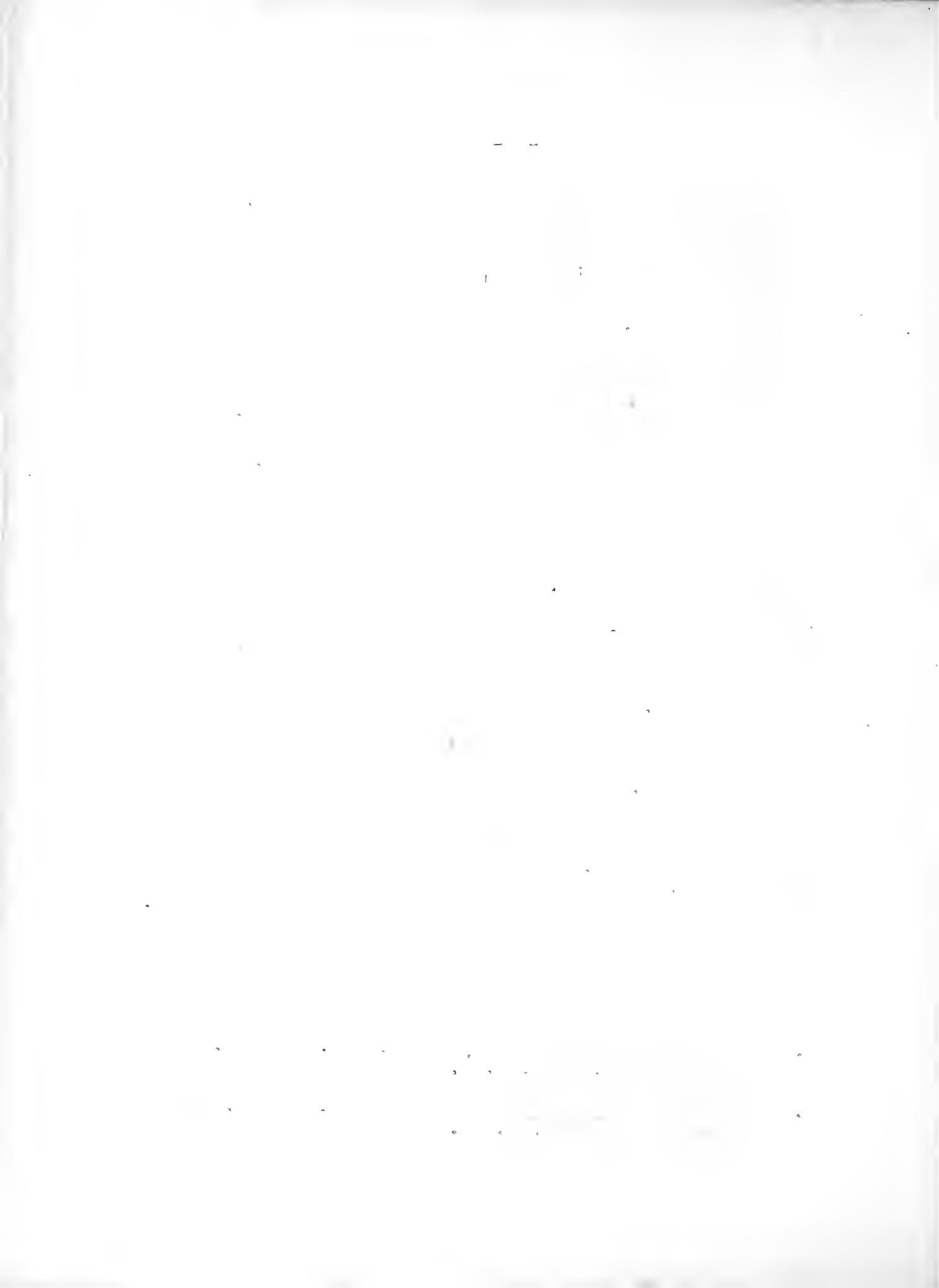
Because of the war emergency tremendous pressure was being put on the carriers for faster delivery of commodities to their proper markets. Much loss was incurred due to improper car loading. The railroads were endeavoring to secure more cooperation from the industry to utilize all available space. The Florida State Marketing Bureau worked with the railroads in trying to develop better cooperation from the growers.

In some instances, final citrus sales were not proving satisfactory. The Florida shipper was not receiving full payment for his fruit when it was sold on the market.¹³

In order to facilitate better service to the ship-

12. "The Lancer," The Florida Grower, Vol. XVI, No. 19, November 10, 1917, p. 9.

13. "The Lancer," The Florida Grower, Vol. XV, No. 4, January 27, 1917, p. 13.



per, the United States Department of Agriculture established inspection of fruits and vegetables at principal markets under the authority of the Food Production Act of August 10, 1917, which was made available November 1, 1917. The Act authorized the Secretary of Agriculture

. . . to investigate and certify to shippers the condition as to soundness of fruits, vegetables and other food products, when received at important central markets designated by the Secretary, under rules and regulations prescribed by him. These certificates are to be prima facie evidence in all courts of the truth of the statements they contain.¹⁴

In supplying such a service the United States Department of Agriculture gave the citrus shipper a check on the purchaser of his produce.

The Bureau of Markets of the United States Department of Agriculture acted to develop an energetic campaign to influence the consuming public toward the more general use of fresh fruits.

The Florida¹⁵ and California Citrus Exchanges¹⁶ were conducting national advertising which helped keep the

14. "Will Inspect for Shippers," The Florida Grower, Vol. XV, No. 20, November 17, 1917, p. 15.

15. "Helping Advertise to Sell the Citrus Crop," The Florida Grower, Vol. XV, No. 4, January 27, 1917, pp. 10-11.

16. Charles Collins Teague, Fifty Years a Rancher, pp. 86-88.

prices at a high level. During the season of 1918-1919 Florida oranges sold at \$11.00 a box on the New York market with grapefruit bringing \$8.00 a box and California navels \$10.00 a box.

. . . this year has seen the steadiest and best markets in a decade, one reason being the short crop and the other the general prosperity of the country and consequent great buying power of the people. There is no reason to suppose that this buying power will be any less next season; rather it will have increased. It is true that there will be a larger crop but as has been pointed out, there are not packing houses enough to pack nor cars enough to move fruit faster than it was packed and moved before Christmas last year and there seems to be no good reason to look for a market break other than conditions which may be brought about by over eager shippers who may rush immature fruit to market in spite of the law.¹⁷

In April, 1919,

. . . reports from all parts of the country regarding the condition of trade show that a general improvement is under way . . . The economic disturbances feared a little while ago are not as widespread, and where strikes occurred they are well in control without serious results.

The labor situation is gradually being adjusted . . . Food and labor prices are still high and must remain so until production is increased. The foreign demand for foodstuffs and building material will be large for some time to come . . .

We will probably never get back to pre-war scales of wages, nor low prices for foods and manufactured commodities, but there will be gradual reduction and a readjustment between those existing during the war and before it.

17. "Shipping Season Over," The Florida Grower, Vol. XVIII, No. 1, July 6, 1918, p. 9.

The railroad transportation situation is not altogether satisfactory, and probably will not be until the country knows who owns the roads. Maintenance of track and equipment has not kept up with the growing traffic of the country, and unless extensive improvements are undertaken soon, general business will suffer.¹⁸

Out of a common need for cooperation, the citrus industry of Florida, the railroads, and the state and national governments were working more closely together. The Florida Cooperative Law of 1909, the State Marketing Bureau which was organized in 1917 and the inspection service of fruits and vegetables established by the United States Department of Agriculture in 1917, all filled an economic need brought about by rising production and war conditions. The war introduced changes in our national economy and the government was called upon to organize the country's resources.

18. Editorial, The Florida Grower, Vol. XIX, No. 15, April 12, 1919, p. 5.

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1. The first part of the report
describes the general situation
of the country and the
main features of the
economy.

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CHAPTER V

A SURVEY FROM 1920 THROUGH 1929

During the period from 1920 to 1925 the problem of increased transportation costs was not only affecting the shipper and the grower of citrus, but also the consumer.

The railroad situation is involved in a maze of complications almost as desperate as the state of international relations. There is so much antagonism to be overcome, and such a division of authority that the proceedings are interminable. The railroad companies are trying to get into position where they will be able to exercise some effective authority in the operation of their lines. Their charges are fixed by the Interstate Commerce Commission and wage rates are fixed by the new railroad board. The new scale of charges was designed to provide net earnings of approximately $5\frac{1}{2}$ per cent upon the value of railroad property, but a great many of the roads are not making operating expenses, and the public is protesting that the rates are greater than the business of the country can bear.¹

The citrus industry was called upon to make several changes in its methods for handling shipments. Growers and shippers were asked to combine their fruit in the available cars, ship over longer periods with less fruit going out at one time, cut down on cancellations which cause shortages in other sections, and cooperate in the handling of the overall picture in a much more satisfactory manner.

The railroads needed repairing and new equipment. It was necessary to issue higher rates on all commodities.

1. "The Railroad Situation," The Florida Grower, Vol. XXIII, No. 13, March 26, 1921, p. 3.

In return for this increase they promised better service and equipment.

It was found that rail rates were increasing to such a degree that it would be no longer possible to pass these increases along to the consumer. The selling price of perishables is governed by the law of supply and demand. It is not possible to hold fruit until prices are favorable.² When fruit is ready for shipment, nothing can be done to delay its shipment. The shipper must send the fruit regardless of the market price or transportation costs. Florida and California endeavored to reduce excessive rail rates. The Orlando Perishable Traffic League was formed with its main object being ". . . the regulation of all matter pertaining to railroad traffic as applied to citrus fruits and perishable vegetables in and out of the State of Florida."³

Because of excessive rail charges and increased labor costs, growers were finding it difficult to stay in business, many of them being called upon to sell their groves to pay outstanding mortgages. However, one good result to

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2. Florida Department of Agriculture, Cooperative Agriculture in Florida, No. 92, New Series August, 1941, p. 66.
 3. "Traffic League Formed," The Florida Grower, Vol. XXIII, No. 4, January 22, 1921, p. 12.

the industry from higher costs was that growers and packers were using more discrimination as to the quality and packaging of their citrus. Before this time the citrus grower shipped anything to the market. Now, with the increased labor costs and rail rates it was not profitable to ship poor produce to the market.

From a marketing standpoint, the year 1920 was outstanding in prices obtained for citrus. Whereas much citrus was shipped in the early part of the season in a green condition, it did not seem to affect the demand. Grapefruit had established itself in the northern markets as a staple food. Retailers and jobbers worked together to develop the citrus market which resulted in increased sales and prices.

The season of 1920-1921 showed higher cost of production as a result of increased labor costs following the war years. However, citrus sold at higher prices on the markets and the grower did not feel the effect of the higher labor costs.

During the war years little was said about immature green fruit. This may have been due to the fact that demand exceeded supply. After the war Florida citrus growers and shippers were beginning to feel repercussions from northern markets regarding poor quality of immature fruit. More than \$1,500,000 was lost to the grower and shipper by ship-

ping green fruit to the market.

During the season of 1921-1922 much pressure was brought to bear on the grower and shipper to limit the shipment of immature green fruit. By limiting the amount of fruit on the market a higher price resulted. During this period there were several marketing developments. It was believed that the "south" was a natural market for citrus fruit with its small retailers and close proximity to production. Before action could be taken, it was necessary to make a thorough investigation and survey of what these needs might be.

It was found that one of the causes for poor marketing was due to the lack of intelligent information in the hands of the grower and shipper regarding competition and supply into northern markets. Many growers and shippers were endeavoring to undercut their neighbor's prices. They did not realize that by so doing this type of marketing would in the long run defeat their purpose. It was felt in the trade that there should be some method of determining a fair price, and this price should be held firm by all those currently doing business in the industry.

Progress was being made in the canning of citrus juices. Advertising was emphasizing that citrus juice was beneficial to the health of the country. By canning a cer-

tain percentage of the mature fruit it helped eliminate a flooded market. It was thought that many thousands of boxes of citrus, which normally would decay under the trees during the season, could be used if it were canned and put aside for use later on.

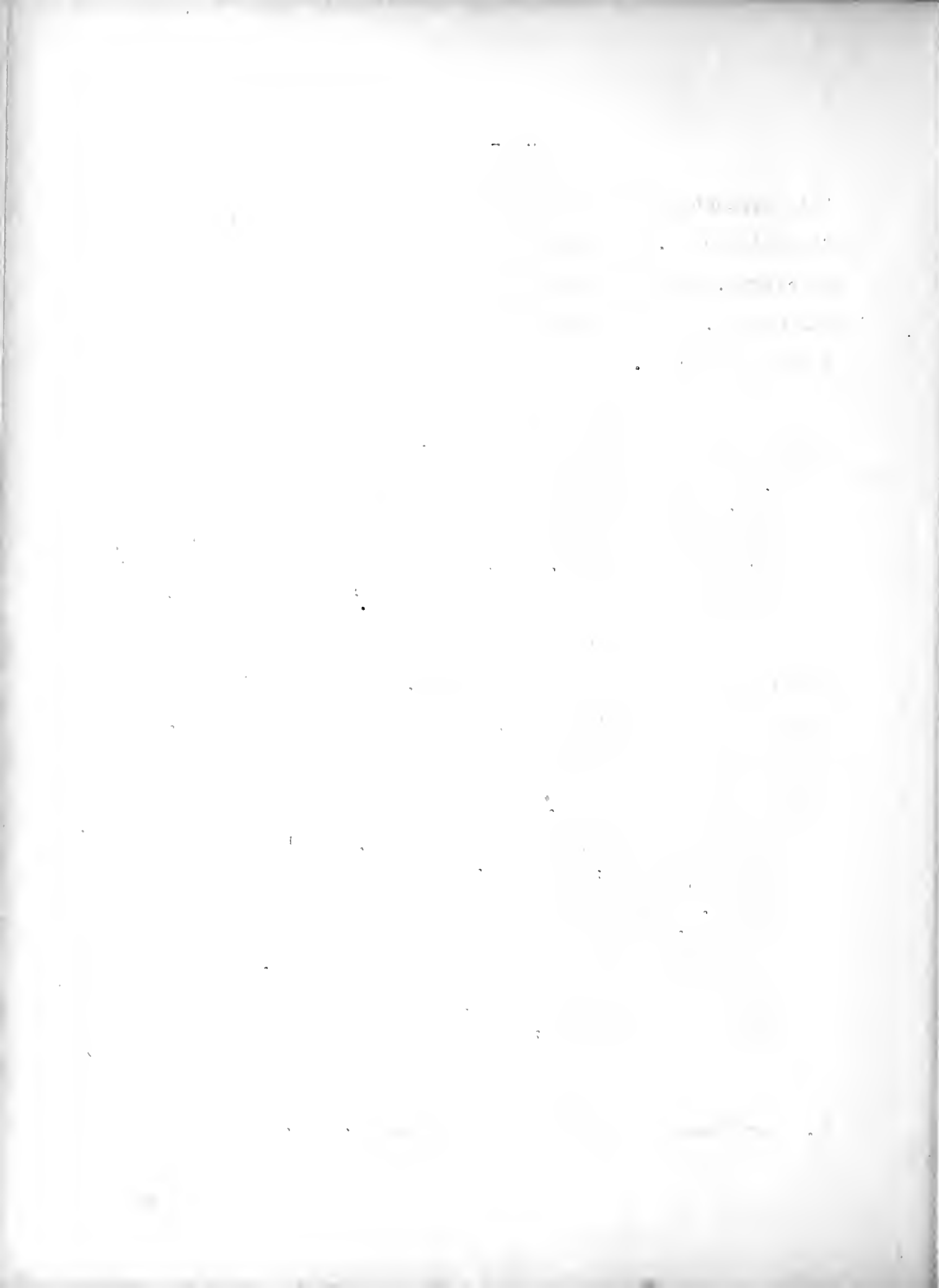
Florida and Puerto Rico were the pioneers in canning grapefruit juice and sections. They

. . . had no one to guide them with technique or machinery. Neither the National Cannery Association at Washington nor the Federal government research laboratories had produced bulletins covering the canning of grapefruit or its juice. Machines for preparing or processing the product had not been perfected because the industry had not yet demanded them.⁴

Many improvements were being made by these pioneers in the preparation of their product. They did not think of the amount of advertising it would take to introduce it. New machinery was built and canning plants were set up in Puerto Rico and Florida.

During that winter of 1921-1922 Mr. Polk's Miami cannery put up 11,000 cases. The Ralph Polk and Puerto Rico production created a sensation in the canning trade. Grapefruit canneries arose in many parts of Florida. One of fourteen competitors who leaped into the race during the winter of 1922 and 1923 was not aware that grapefruit should be sterilized. He canned a carload in cold winter weather and shipped to a wholesale house at Kansas City. Cold weather enroute protected the shipment, but warm weather in Kansas City

4. Earl Chapin May, The Canning Clan, p. 368.



caused every can to explode. Mr. Polk packed more than 100,000 cases at Miami, Vero Beach, and Haines City, Florida, that season. In the spring of 1922 his stock had an inventory value of \$90,000. He finally sold it for about \$12,000.

Mr. Street at Bradenton . . . selected 1921 to do his first commercial processing of grapefruit juice in tins, and 1922 was his first year commercially to can grapefruit segments or hearts.⁵

It may be noticed during this season that shipments of citrus were becoming more frequent to previously undeveloped markets, and it was found that California was shipping to London and Rotterdam with entirely satisfactory results.

Because of tightening economic conditions, the consumer was demanding better quality and packaging of the fruit.

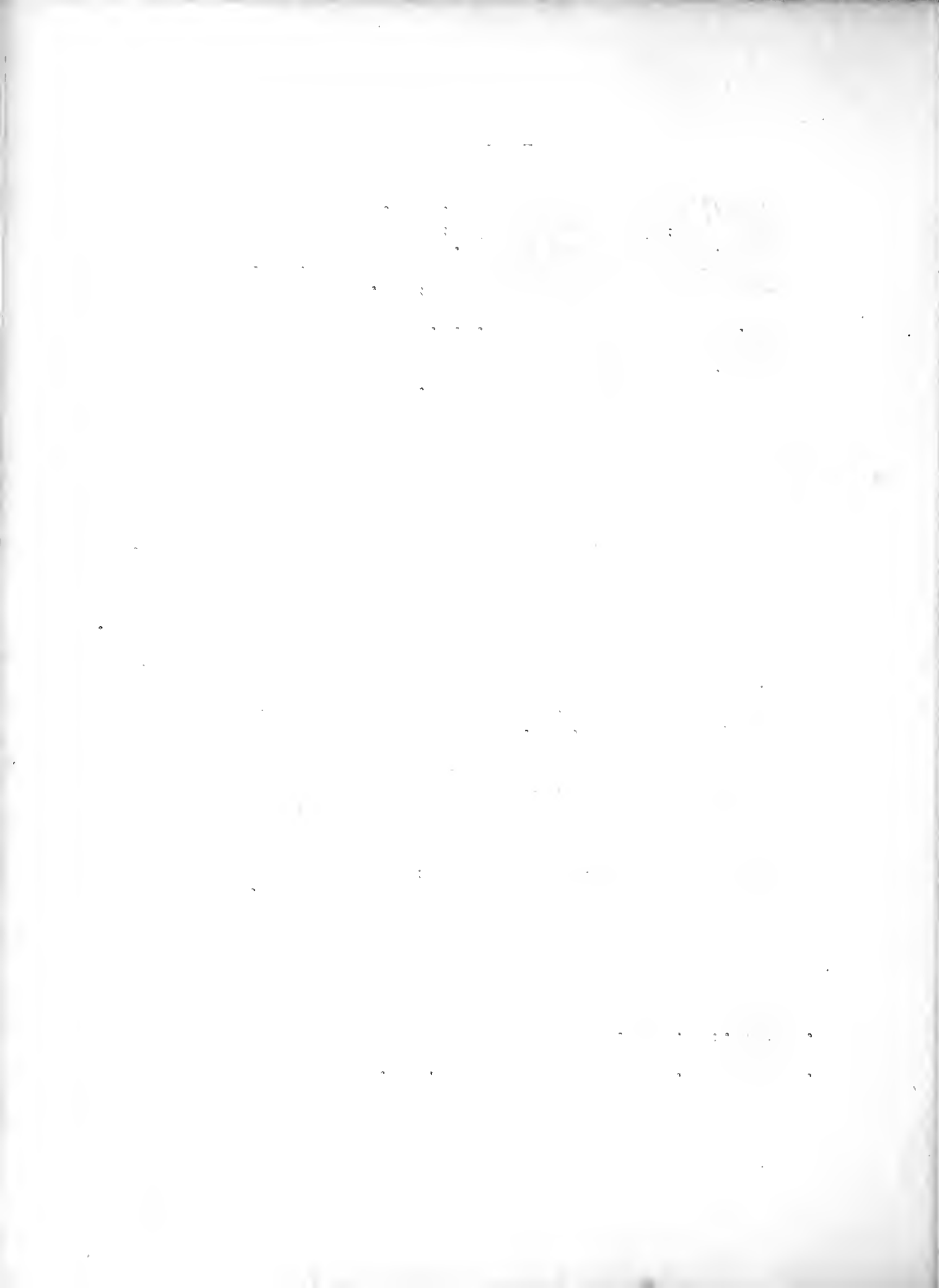
Standardization and grading help to protect merchandise in transit from damage and to reduce the cost of marketing by achieving economies in freight and storage charges . . .

Standardization of packages, such as boxes, crates, tubs, barrels, facilitates proper loading of the transportation vehicle and economizes space . . .

The grading of a product at the shipping point, to remove unmerchantable produce, saves freight charges and makes the shipment more readily salable.⁶

5. Ibid., p. 369.

6. Edward A. Duddy, Marketing, p. 60.



The Standard Container Bill which had been introduced in Congress in 1920 was now passed,⁷ making it unlawful to manufacture, sell, or offer for sale anything not complying with regulations set forth in this bill.

Precoloring rooms using ethylene gas assisted the packer to bring his fruit up to certain color standards.

In Florida, some of the early oranges . . . mature before they develop their color . . . Late varieties of grapefruit sometimes remain green in the spring and need to be put through the coloring treatment. . . . It is highly desirable to make the appearance of the fruit match its eating quality throughout its marketing season . . .

The presence of the coloring agent under favorable conditions hastens the natural breaking down of the green pigment in the peel, thereby making a good, legally mature fruit look better. The destruction of the green chlorophyll reveals the previously hidden yellow or orange pigments. There is no actual coloring other than possibly a slight intensification of the orange-yellow pigments.⁸

Inasmuch as the gas used changed only the pigments of oil cells, it was believed no harm was done to the fruit. However, this marketing method might again be used to hasten the salability of immature fruit unless it was thoroughly

7. "Standard Container Bill Passes," The Florida Grower, Vol. XXVI, No. 2, July 8, 1922, p. 11.

8. J. R. Winston and R. W. Tilden, The Coloring or Degreening of Mature Citrus Fruits with Ethylene, p. 1.

1906

1. The first of the year was a
very cold one, with a heavy
frost on the 1st, and a
snow storm on the 2nd, which
lasted for several days.
The weather was very
pleasant, and the crops were
in good condition.

2. The second of the year was a
very warm one, with a heavy
frost on the 1st, and a
snow storm on the 2nd, which
lasted for several days.

3. The third of the year was a
very warm one, with a heavy
frost on the 1st, and a
snow storm on the 2nd, which
lasted for several days.

4. The fourth of the year was a
very warm one, with a heavy
frost on the 1st, and a
snow storm on the 2nd, which
lasted for several days.

5. The fifth of the year was a
very warm one, with a heavy
frost on the 1st, and a
snow storm on the 2nd, which
lasted for several days.

6. The sixth of the year was a
very warm one, with a heavy
frost on the 1st, and a
snow storm on the 2nd, which
lasted for several days.

checked at point of shipment.⁹

The Fruitman's Club was started to promote more cooperative handling of citrus fruit.¹⁰ The railroads felt it necessary to increase rates to the Florida shipper for the use of new refrigerator cars made available for the 1923-1924 citrus crop. To facilitate cooperation between the grower, shipper, and carrier, the Growers and Shippers League was formed

. . . to attend to traffic matters on behalf of state fruit and vegetable shippers, and particularly to wage an effort to bring about an equable readjustment of line haul freight rates which will allow us to distribute Florida products under the same favorable conditions that competitive produce from other states can be transported to market.

It is definitely provided, and the Florida Citrus Exchange, the largest contributing member, distinctly understands, that the league is not expected to deal with any sales problem. In the establishment of this traffic organization there never has been any thought that the league should or even could work to rectify our present deplorable marketing situation, other than lessen the growers' and shippers' burden by securing better freight rates.¹¹

Since the season of 1909-1910 when six hundred

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9. "Uncle Sam Closely Supervises 'Coloring'," The Florida Grower, Vol. XXVI, No. 14, September 30, 1922, p. 9.
 10. "Fruit Buyers Cooperate," The Florida Grower, Vol. XXVII, No. 2, February, 1923, p. 3.
 11. "The League Will Limit Work to Rates," The Florida Grower, Vol. XXIX, No. 1, January 5, 1924, p. 11.

thousand boxes of citrus were marketed, production had increased to approximately twenty million boxes during 1923-1924.¹² State Marketing Commissioner, L. M. Rhodes, proposed

. . . better preparation in production, better grading, standardization, and inspection would add \$10,000,000 to \$15,000,000 to the value of the citrus crops of Florida and they are all available to Florida shippers through the services of the State Marketing Bureau and the U. S. Bureau of Agricultural Economics.¹³

Production was still a problem facing the industry during the 1920-1929 period. Absentee ownership of citrus properties in Florida as a result of the real estate boom placed the management of the groves in untrained hands. However, it was still reasonable to believe that a great many of the new owners would continue with their newly purchased orange groves and also set out new plantings wherever possible.¹⁴

Florida was naturally, because of its climatic conditions, an excellent customer for refrigeration facil-

12. Florida Department of Agriculture, Citrus Industry of Florida, p. 12.

13. L. M. Rhodes, "Our Problem," The Florida Grower, Vol. XXIX, No. 8, February 16, 1924, p. 6.

14. University of Florida, Florida Agricultural Experiment Station, Bulletin 287, Economic Study of Absentee Ownership of Citrus Properties in Florida, H. W. Hawthorne and J. E. Turlington, 1935, p. 25.

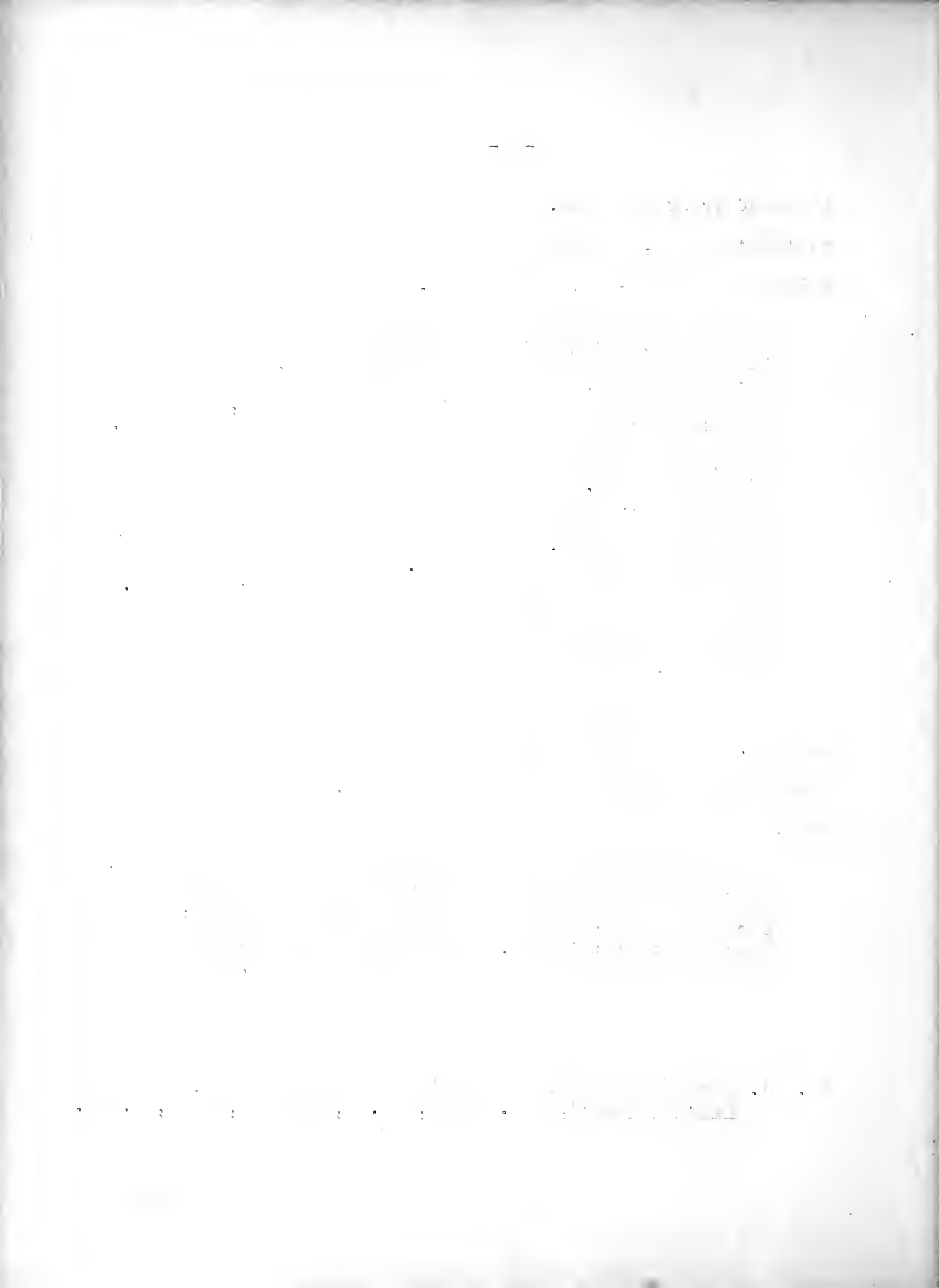
ities of transportation. Progress was being made by the railroads and 3,000 new refrigerator cars were made available for the 1923-1924 citrus crop.

At the time of the organization of the league there was confronting the industry a proposed increase in the refrigeration charges from Florida. Evidence was accumulated, prepared and presented by the aid of the State Railroad Commission and its counsel, and the proposed increase in refrigeration charges was defeated. It was also proposed by the carriers to adopt a rule in the tariff requiring three hoops or straps on each box of citrus fruit. This proposal was likewise opposed and defeated. The carriers proposed a charge for the use of dry refrigerator cars and this proposal was opposed and defeated. The carriers published a tariff for a charge of from \$5 to \$15.53 for the use of a dry refrigerator car in which to load precooled vegetables. Evidence was prepared by the league and at the hearing a compromise was reached with the carriers whereby the tariff was withdrawn and the shippers withdrew their complaint.¹⁵

Florida was feeling the first pains of a recession in 1926. The citrus industry felt the economic effects of this through a general lowering of prices. It was believed that:

The citrus growers of Florida should be particularly concerned with competition contending for that part of the food dollar that is used to purchase fruit, cereals and such other items as are eaten to take the place of citrus fruits. The family eating prunes for breakfast will not eat grapefruit or oranges. The

15. J. Curtis Robinson, "Making the Railroads Behave," The Florida Grower, Vol. XXXII, No. 3, July 18, 1925, p. 13.



woman serving a pineapple salad will not at the same meal serve an orange salad.¹⁶

Those in the field of advertising realized that in order to meet this competition,¹⁷ Florida should spend dollar for dollar and put out at least as much effort to obtain customers as her competitors. California was putting out approximately one million dollars to sell its crop. The question was, how much was necessary for Florida's advertising to combat California's campaign. Now was the time for the cooperatives and independent growers and shippers of Florida to pool their efforts in establishing their product.

In considering the budget for advertising there is great danger in setting up one that is inadequate to do the job. More advertising campaigns have failed because of an inadequate appropriation than for any other reason. That this is so is evidenced by the many advertisers who for years have tried to do a certain job with insufficient funds and who finally have appropriated a sufficient sum of money to make the goal that they had set.

An example with which we are quite familiar is that of a certain cereal manufacturer who for years had been trying to secure a much larger and needed part of the New York market. This concern was confronted with severe competition from firms long established in this market. After seven years futile effort of trying to crack the New York market with inadequate funds, this concern appropriated a sum slightly in excess of their

16. "One Million Dollars for Fruit Advertising," The Florida Grower, Vol. XXXIII, No. 14, April 3, 1926, p. 4.

17. C. C. Commander, "Florida Citrus Faces Advertising Competition," The Florida Grower, Vol. XXXIII, No. 10, March 6, 1926, p. 16.

1. The first part of the report is devoted to a general survey of the situation in the country.

2. The second part of the report is devoted to a detailed analysis of the economic situation in the country.

3. The third part of the report is devoted to a detailed analysis of the social situation in the country.

4. The fourth part of the report is devoted to a detailed analysis of the political situation in the country.

principal competitor. During the first year of this larger campaign they more than doubled their business. By the end of the second year they had tripled their business.¹⁸

The potential market in the year of 1926 of one hundred twenty million people or approximately twenty-five million families would limit expenditure of one million dollars to only four cents a family per year. This small allocation of funds would necessarily raise the question of what was the best medium of advertising to use. At this time magazines were developing rapidly and due to intelligent, though young, advertising methods were opening up huge avenues through which consumers could be reached. Educational as well as display advertising was, therefore, given greater opportunity to prove its effectiveness. Although the depression continued in Florida and sales diminished, advertising was well established in the industry.

The shipping season of 1926-1927 was primarily affected by a severe wind storm in September which damaged two million boxes and two freezes, one January 10, 1927 and another January 15, 1927. Badly damaged fruit found its way to out of state markets and resulted in dissatisfied customers and bad publicity. However, with all of these dis-

18. "One Million Dollars for Fruit Advertising," The Florida Grower, Vol. XXXIII, No. 14, April 3, 1926, p. 4.

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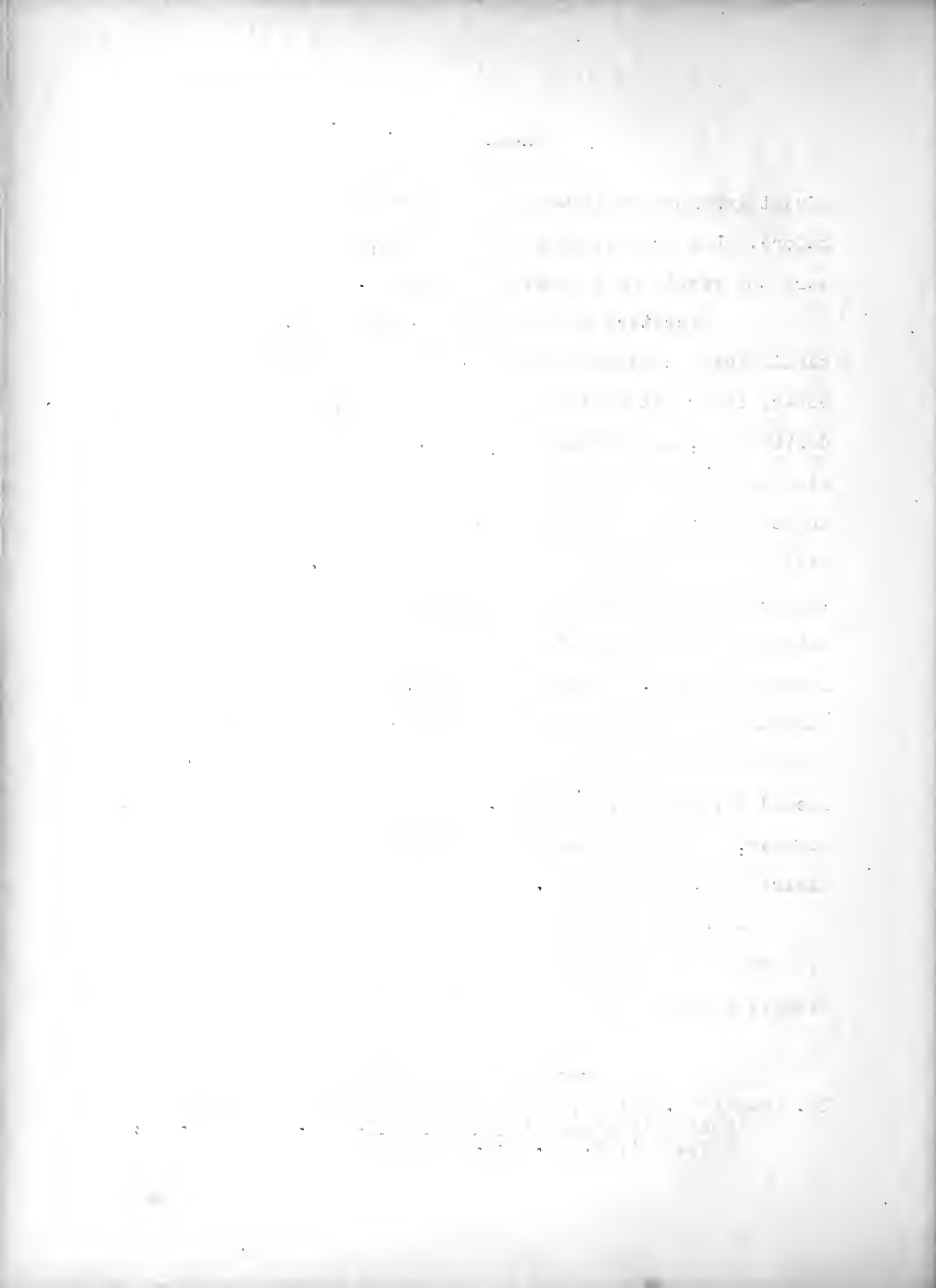
24. *Leptocarpus*
25. *Leptocarpus*

advantages more fruit was shipped during this year than ever before. Low prices, poor distribution, and keen competition were the result of the heavy production.

Secretary of Agriculture Jardine recommended establishing a clearing house¹⁹ to supply shippers with necessary information regarding cars shipped, quality of fruit, destination, and prices at markets. The clearing house would also regulate total volume of fruit which its members shipped in accordance with market demands and would direct proper distribution of crops throughout the season. It would also enforce standardization of grades and pack and stand behind national advertising of Florida fruit and development of foreign markets. These suggestions, although liked by many outstanding figures in the industry, received much opposition from those who did not believe the Florida citrus industry needed government regulation. It was the general consensus, however, that something should be done to guarantee better distribution of the crop.

During the year 1928 a committee of fifty Florida growers assembled in August and decided that the Florida Growers Clearing House Association was necessary and should

19. Marvin H. Walker, "Developments in the Citrus Clearing House Plan," The Florida Grower, Vol. XXXV, No. 15, August, 1927, pp. 3-4.



be put into operation functioning under the Capper-Volstead Act.

Provided a basis for the organization of cooperatives doing an interstate business and gave them wide latitude for controlling the marketing of their crops without causing any conflict with the Sherman or Clayton antimonopoly acts.²⁰

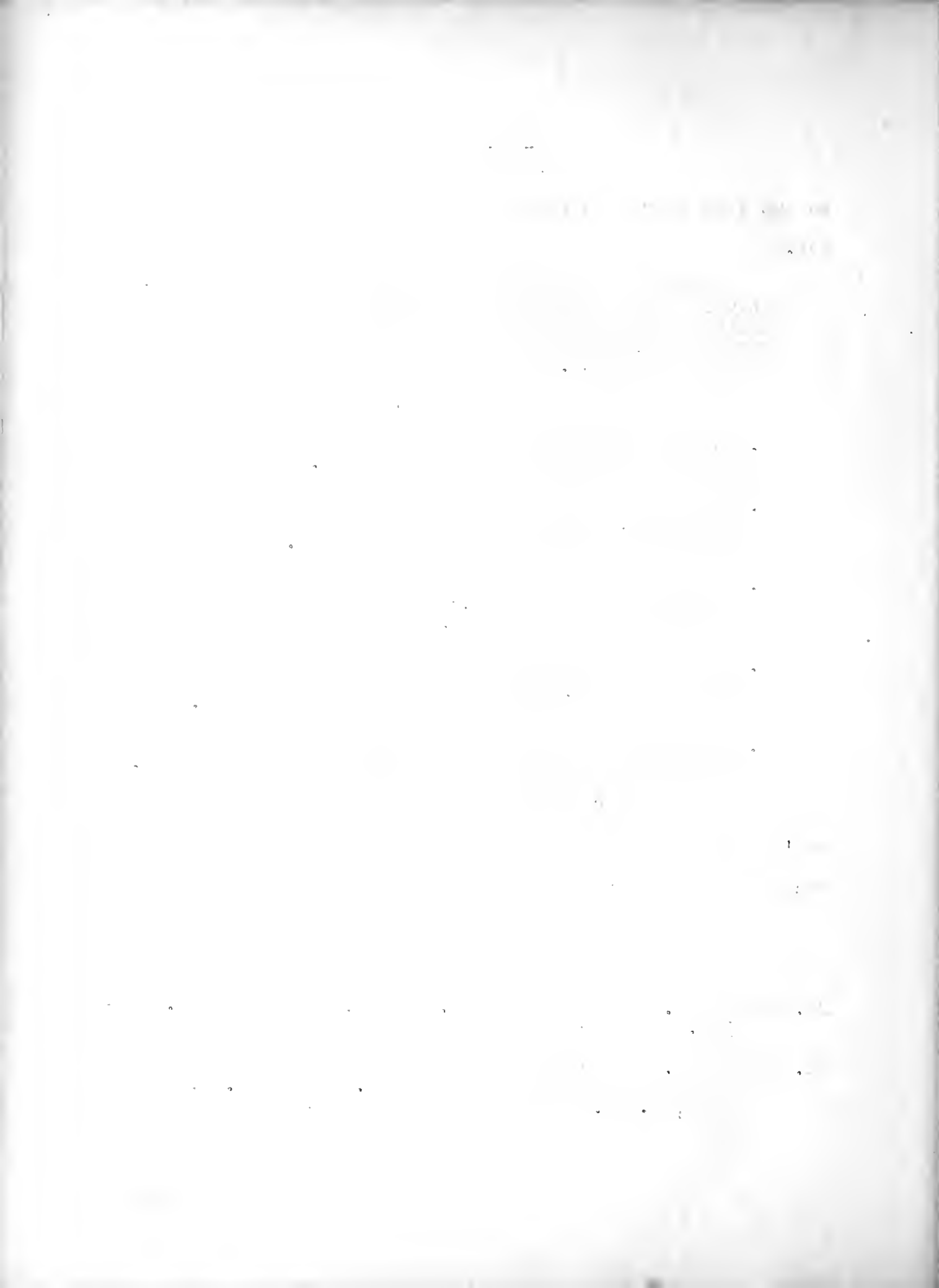
The clearing house committee was set up for:

1. Standardization of the grade and pack of all fruit handled by clearing house shippers.
2. Regulation of carlot loadings of all clearing house shippers, so as to control the total volume of fruit leaving the state at all times.
3. Regulation of distribution of shipments, so that prices will not be sacrificed by needlessly "flooding" some markets.
4. A nation-wide advertising campaign on Florida fruit the cost of which would be paid by a box retain on all fruit handled by clearing house shippers.
5. Exchange of price, shipment and crop information so that the affairs of the industry may be regulated.²¹

With the formation of the Clearing House the Fruitman's Club was dissolved "as an organization and the club recommends to each of its members that they join the new

20. Edward A. Duddy and David A. Revzan, Marketing, pp. 356-357.

21. Marvin H. Walker, "Citrus Growers Plan Their Own Clearing House," The Florida Grower, Vol. XXXVI, No. 4, April, 1926, p. 12.



Clearing House Association."²²

The Agricultural Marketing Act was passed in 1928 by Congress. It created a Farm Board to be appointed by the President and placed 500 million dollars at its disposal . . .

The Farm Board interpreted the Agricultural Marketing Act as giving it authority to establish a grower-owned and grower-controlled system of cooperative marketing and cooperative purchasing of supplies essential to the production and processing of agricultural commodities for market. Under the terms of the Act, the Board could make loans only to cooperatives organized under the Capper-Volstead Act. This meant that such cooperatives had to be grower-owned and controlled, and that at least 50 per cent of the products handled or marketed by the organization must be produced by its members.²³

Florida received benefits from the Federal Farm Bureau through their

Recognition of the Florida Citrus Exchange as the logical organization around which such a unified sales program can be developed . . .

The Federal Farm Board is reported to have tentatively agreed to advance the Florida Citrus Exchange enough money to enable it to carry out this program . . . with respect to the unification of citrus marketing.²⁴

22. "Fruit Men Approve Clearing House Plan," The Florida Grower, Vol. XXXV, No. 18, November, 1927, p. 24.

23. Charles Collins Teague, Fifty Years a Rancher, pp. 165-169.

24. "Unification of Florida Citrus Marketing," The Florida Grower, Vol. XXXVII, No. 10, October, 1929, p. 12.

CHAPTER VI

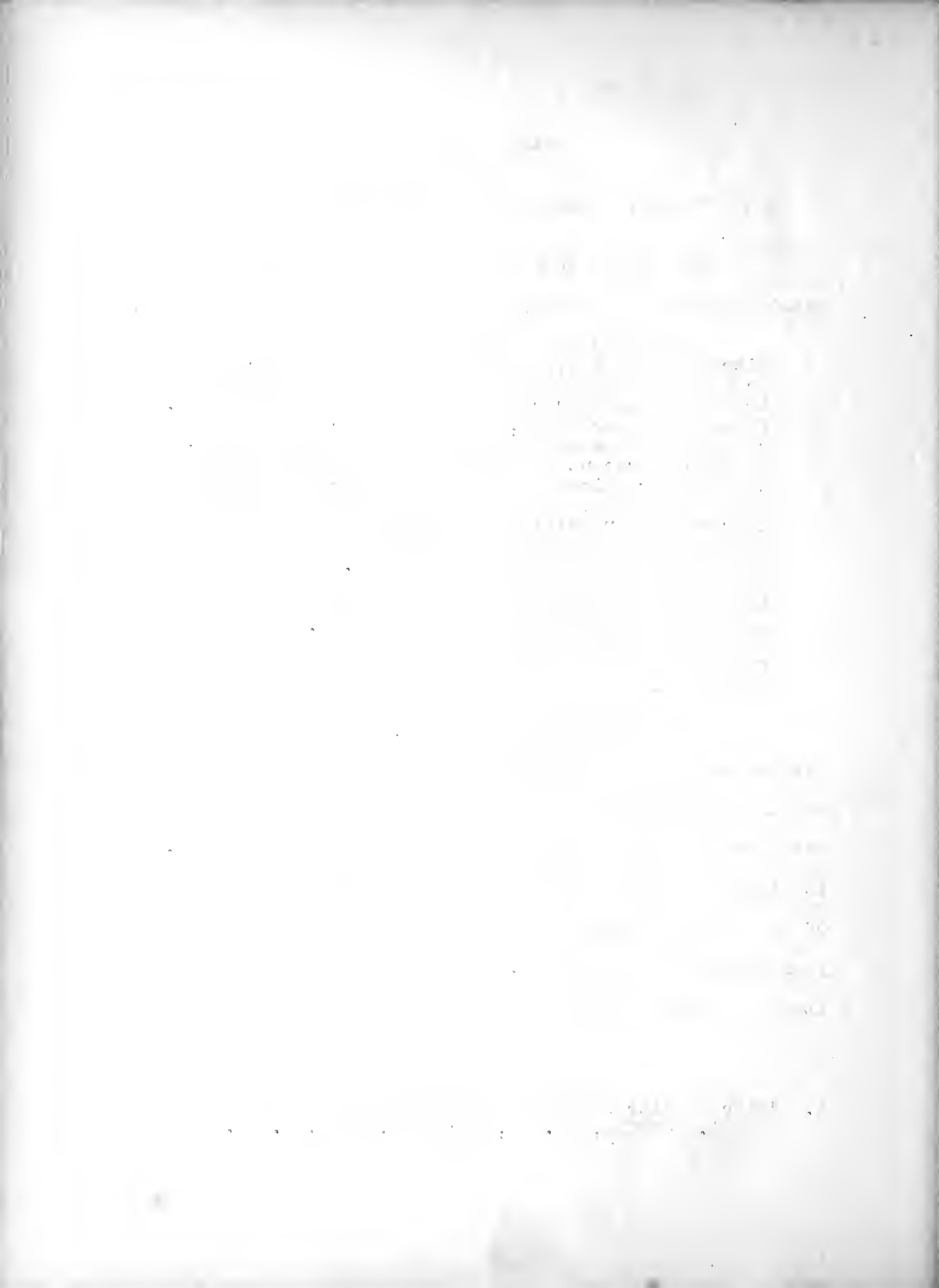
A SURVEY FROM 1930 THROUGH 1939

The future of Florida citrus at the turn of the decade appeared to be better than it had for several years.

With the world situation that exists relative to citrus production, the Florida citrus growers are probably in as favorable a position with respect to the future as growers in any citrus producing area. Progress in marketing, the growing strength of the cooperative movement in citrus marketing, the expansion in recent years in the use of cover crops, changing practices relative to cultural and fertilizer practices, all point to reduced production costs, improvement in quality and better marketing. The expansion of the citrus canning industry has been of material value to the citrus grower. This does not appear to be the time for any great acreage expansion, but a time to devote all energy to careful handling and development of the present acreage. The release from quarantine restrictions should prove a helpful factor and be of material assistance in the marketing situation.¹

Considerable note was being taken of foreign citrus outlook and the United States Department of Agriculture reported at the end of 1930 that Spain, Palestine, and Syria oranges were about the same as previous years. It might be noted in passing that California enjoyed one of the largest returns from its citrus investment during the year 1930 than ever before. Texas was beginning to prove itself a factor in the production of grapefruit and numerous

1. "Florida Citrus Outlook Favorable," The Florida Grower, Vol. XXXVIII, No. 12, December, 1930, p. 18.



plantings were started which would not be bearing for five years. There was much discussion regarding exporting citrus fruit and many suggestions were offered to those interested in this branch of the business.

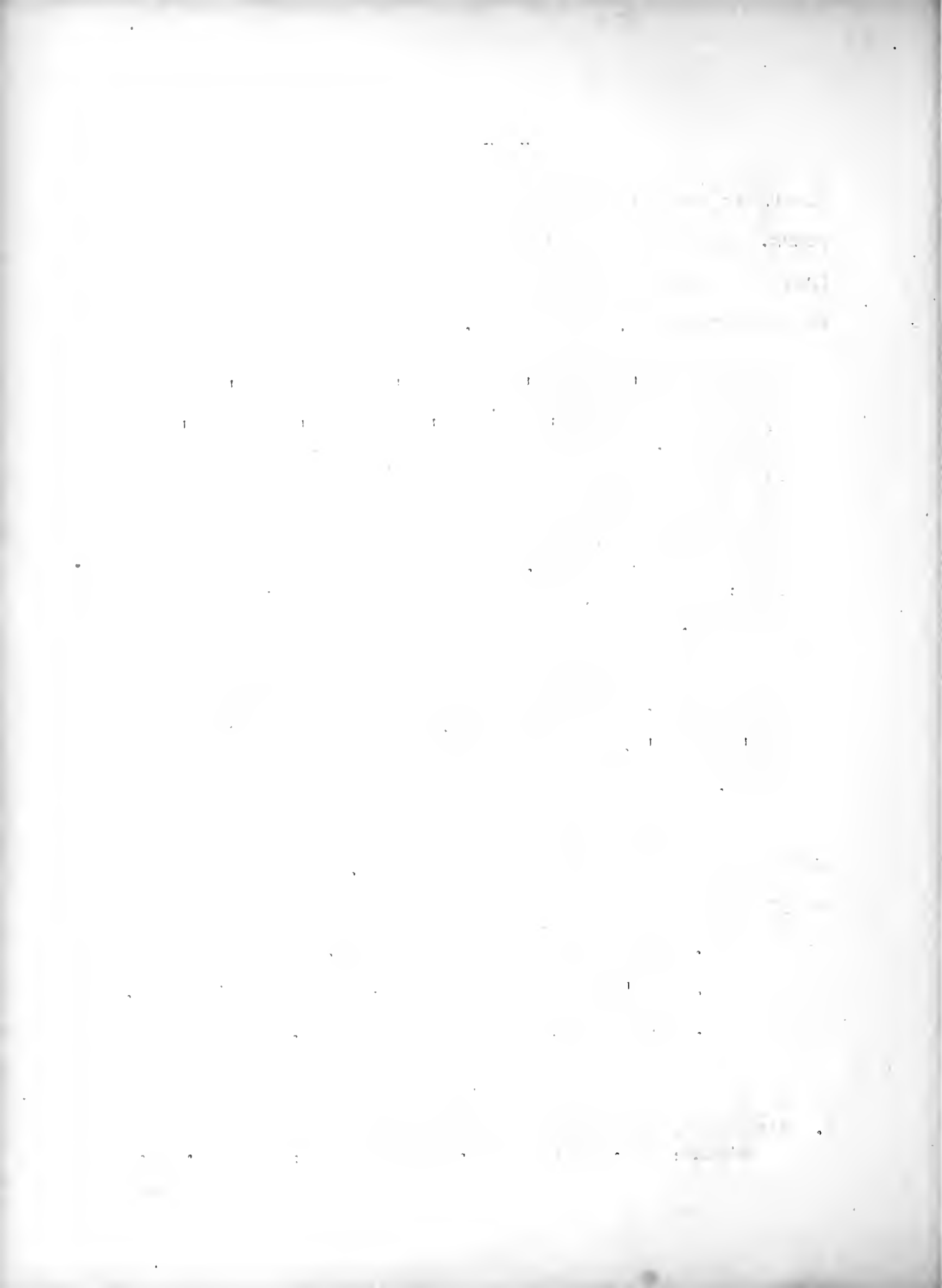
England offers a splendid market for Florida grapefruit in 80's to 126's; with 70's next and 54's and larger almost worthless. She also offers a fair market for oranges in 176's and 200's; with 96's and 100's worthless. A grapefruit demand for 20,000 boxes a week, divided equally between London and Liverpool markets is already developed. Except for the Christmas holidays, this demand will carry from December to September (during the holidays England is glutted with fruits from the four corners of the earth and her market is always over-stocked). That means a total of around 650,000 boxes can be disposed of at prices, size considered, more profitable than possible in domestic outlets.

Germany, France, Holland and the northern countries know and care little about grapefruit, except for tourist demand. They all like the flavor at first taste, and are all potential prospects for the larger sizes, 46's to 80's. To date nothing has been done in the way of advertising or developing a market in any of them.²

Many suggestions were given to potential exporters with reference to packaging of the fruit. Some of them were as follows:

1. Pick only during dry weather.
2. Don't export fruit fully-colored artificially.
3. Avoid a tight twist in wrapping.

2. Mark Hyde, "Foreign Markets for Citrus Fruit," The Florida Grower, Vol. XXXVIII, No. 11, November, 1930, p. 26.



4. Avoid a high bulge.

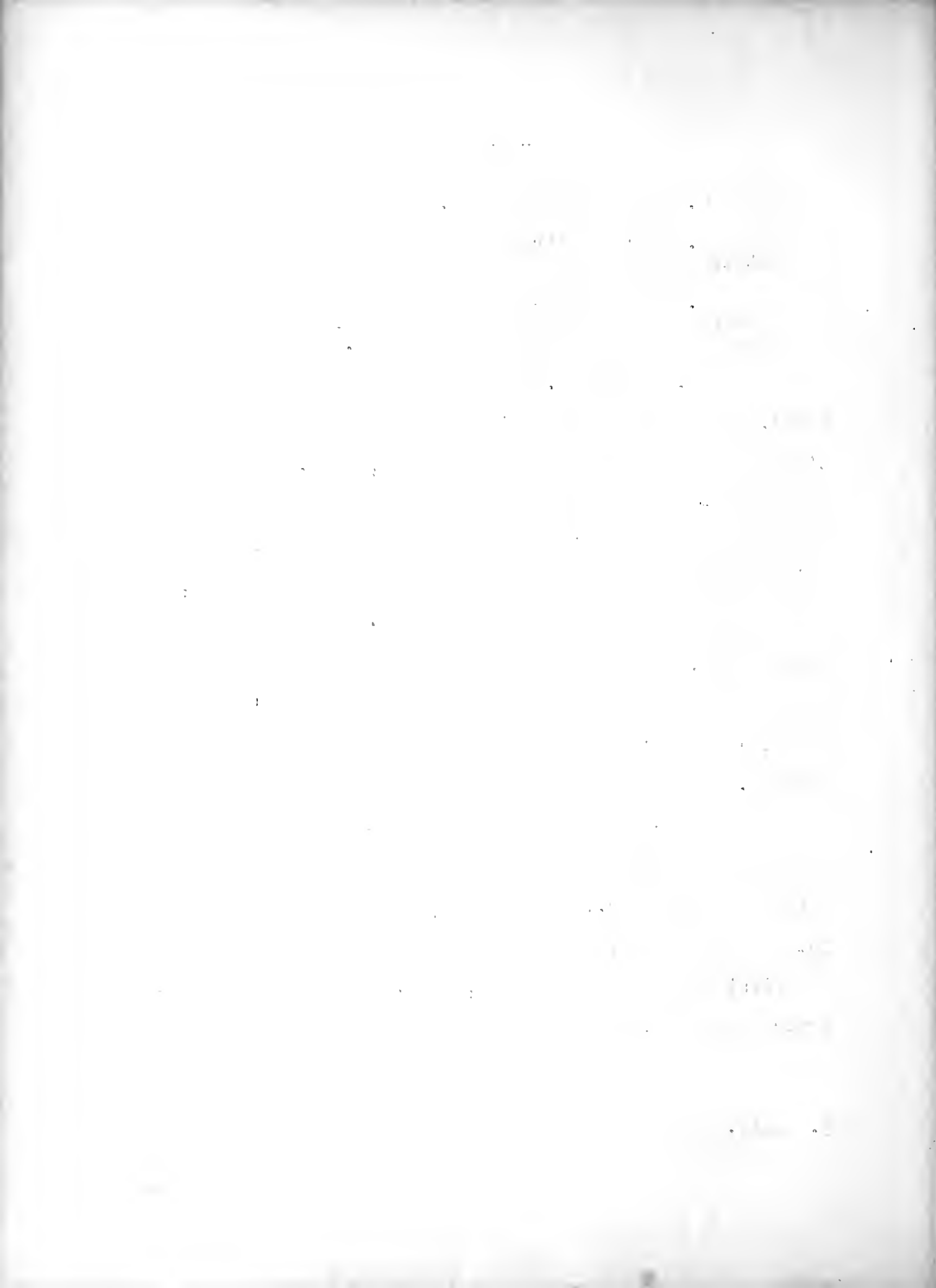
5. Wire or strap each end of the box and always strap the center.

6. Nail a two-inch high by one-inch wide wood strip across the center partition to³ take the shock when boxes are dropped on the bulge.

Mr. Charles C. Teague, member of the Federal Farm Board, spoke at several meetings of growers on a tour of the citrus area in Florida during November, 1930. The object of his talks was the unification of Florida citrus growers in an endeavor to strengthen good marketing methods, including better distribution, standardization of grade and pack, better consumer advertising, and more distribution through by-products. He gave reason to believe that if the Clearing House, which controlled 80 per cent of the state's citrus crops, would show good marketing results, it would be a success.

A by-product of the citrus industry sponsored by the National Juice Corporation, a subsidiary of the National Dairy Products, Inc., of New York, started a frozen orange juice organization, producing ten thousand gallons daily with its first shipment February 15, 1931. This was a commercial experiment to determine the practicability of the process of

3. Ibid.



quick freezing. Several other plants were started to promote the same product which included orange and tangerine juice.

Considerable attention was put to developing a direct retail trade whereby the fruit was: (1) shipped in bulk for packing at destination; (2) the establishment of sales offices in eleven northern cities including Baltimore, Boston, Chicago, Cincinnati, Cleveland, Detroit, New York, Philadelphia, and St. Louis; (3) placing stress upon the savings which could be effected by eliminating wholesalers' profits and auction market charges; and (4) small attractive containers sponsored for increasing consumer demand with chain stores indicated as principal outlets.⁴

The nation was suffering at this time the worst depression in its history. Every state was affected by this drastic upheaval in the national economy. The Farm Board and the Intermediate Credit Bank, with the approval of the Federal Farm Loan Board was loaning millions of dollars every year to Florida farmers.

Through the "new green fruit law" immature fruit that had been treated with arsenic⁵ was prohibited from the

4. "Selling Direct to Retail Trade," The Florida Grower, Vol. XXXIX, No. 5, May, 1931, p. 22.

5. "Arsenical Spraying Becomes Major Issue," The Florida Grower, Vol. XL, No. 6, June, 1932, p. 9.

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markets and closer inspection, with the aid of chemical tests, did much to regulate indiscriminate shipping.

The problem of bulk shipments presented itself during the year 1932. Poor quality fruit was being shipped to the markets causing much damage to Florida's citrus reputation. Good organization was required to handle this problem.

The Florida citrus grower and shipper received some benefit at this time from the railroads in a reduction of from 18 per cent to 25 per cent in rates after the first of the year. Coastwise shipping was being used to reduce costs of shipping citrus. More than 18 per cent of the total commercial movement was dispatched by boat during January, 1933. Truck shipments were expanding secondary markets and creating a demand which had not been apparent before. During 1933 more attention was given to the development of frozen orange juice and continued experimentation was developing a product that in later years would become one of the greatest sellers in the industry. Research regarding the wrappers used in packaging citrus included moisture proof cellophane and aluminum foil.

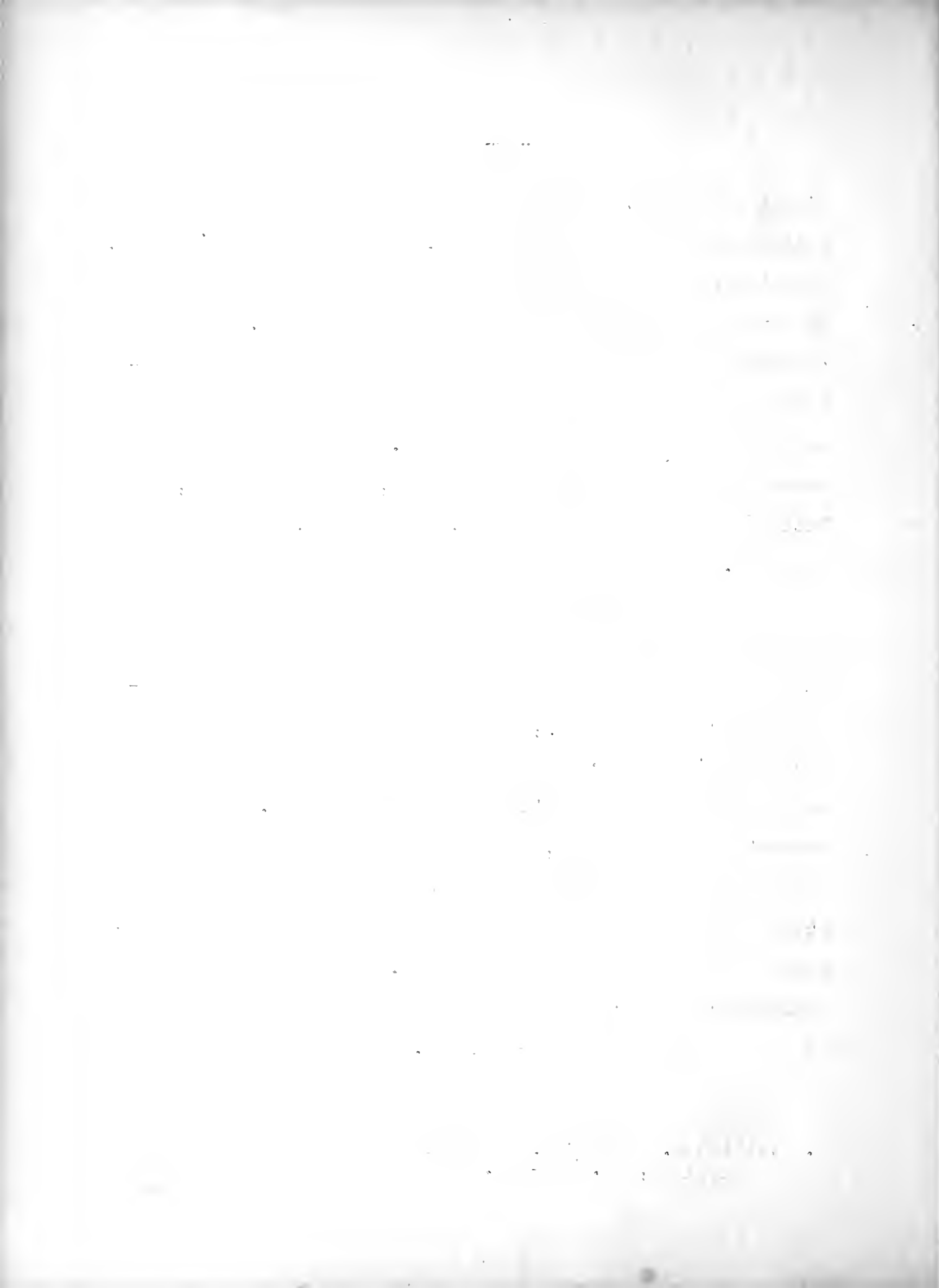
The Farm Adjustment Act⁶ was passed by Congress

6. "Farm Adjustment Act in Effect," The Florida Grower, Vol. XLI, No. 5, May, 1933, p. 10.

giving the secretary of agriculture power to enter into marketing agreements with processors, associations of producers, and others engaged in handling interstate or foreign commerce of any agricultural commodity or product thereof. It was suggested at this time that Florida should take this opportunity to obtain effective control of the distribution while the Farm Adjustment Act was in force. The state and national control committees stressed prorating, standardization, regulation of labor and wage scales, advertising, and licensed shippers.

The Agricultural Adjustment Act of 1933⁷ proposed an agreement which would give federal government officials the authority to enforce a program calling for standardization of grades and packs, regulation of total shipments from each state, and proration of the quantity of citrus which could be sold in any auction market at any time. As it was presented in Washington, the citrus marketing agreement provided for local or state control committees to regulate local activities and a national committee to coordinate the activities of state groups when necessary. A coordinator to administer the agreement was provided and he would be appointed by the secretary of agriculture. The agreement would be

7. William H. Keikhofer, Economic Principles, Problems and Policies, pp. 470-471.



signed with the United States Department of Agriculture by individual citrus growers or shippers who would be licensed by the department and whose right to do business could be revoked if they failed to comply with the agreement. The National committee would prorate shipments between states if that became necessary. The Florida control committee would consist of twelve members, four each from the Florida Citrus Exchange, the Clearing House, and from shippers not affiliated with either group, to be appointed by the secretary of agriculture upon the committee's recommendation. There was much hope that this agreement would go far in helping the citrus industry out of the depression.

It was decided that it was utterly impossible for the shippers and growers to get together voluntarily unaided and undirected by some outside authoritative power.⁸ But one avenue of escape was open to the growers who wanted to cooperate but could not get their neighbors to do so. Government control, or rather government assistance, was the answer in the agreement of the Agriculture Adjustment Act, more commonly known as the AAA. In December, 1933 the Florida control committee officially started its duties which

8. Marvin H. Walker, "Federal Control of Citrus Marketing Looms," The Florida Grower, Vol. XLI, No. 6, June-July, 1933, p. 3.

were to regulate and control shipments of citrus fruit from Florida to outside markets so that an orderly system of marketing could be maintained throughout the marketing season. It was definitely concluded that the fruit must be properly distributed and of a quality that would more than satisfy the consumer. Over-supply of eastern markets was causing great losses to the citrus industry and it was hoped the Florida control committee would stem this overwhelming tide. A freeze in December, 1935 caused considerable damage to the crop and also to the market distribution of the fruit. Many boxes of frozen citrus were shipped, causing much dissatisfaction.

A new state citrus commission was created to control Florida citrus in all its stages. Many believed that this now might aid in a better control of the industry's problems. The Florida Citrus Commission⁹ was created with well-defined powers in the testing, marketing, and advertising of fruit. It imposed a citrus advertising tax with the responsibility of its collection upon the shipper. Maturity inspection, bonding and licensing, cost guarantee, shippers charges, rules regarding color added were all included in

9. Florida Department of Agriculture, Citrus Industry of Florida, Robert C. Evans, "Citrus Marketing," Part III, p. 168.

the powers and jurisdiction of the new commission. Four major points were set up by the commission in its new program for marketing citrus crops.

1. A definite schedule for shipments throughout the season, based upon accurate crop and market surveys, which shippers will be asked to maintain.

2. Development of new markets, with shippers pledging to support with fruit offerings the state's advertising and merchandising activities in such territories.

3. Cooperation of shippers in voluntarily regulating the quantity of fruit offered at auction markets, through the organization of terminal prorate committees.

4. An agreement between fresh fruit and canning interests on the total quantity of grapefruit to be canned next season, and the establishment of a minimum price which will permit the marketing of the greatest volume for the most profit to the grower in this way.¹⁰

Some of the factors in maintaining good markets should include quality, cost of production, experience, ability, and financial strength of the marketing organization and the crop, regulation of supply, and advertising. These factors were conceded to be absolutely necessary if citrus fruit was to be marketed with the same dispatch and orderliness as any other product in the United States of its size.

10. "New Program for Marketing Citrus Crops," The Florida Grower, Vol. XLIV, No. 8, August, 1936, p. 7.

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The Florida Control Committee¹¹ decided to adopt a policy of controlled marketing, endeavoring to get the citrus to the markets in regulated amounts in an honest endeavor to bring higher prices to the grower and shipper. However, the factions within the industry were becoming incensed at each other, each faction adopting different sides. The cooperatives called for a volume prorate rise through the season and a large group of independents opposed anything resembling seasonal prorating by way of volume allotments.¹² In general it seemed very difficult for most of them to take any type of citrus control seriously.

The AAA, in an endeavor to control prices, was purchasing relief grapefruit. The Department of Agriculture considered grapefruit surplus one of the country's major agricultural problems. It was thought that the present marketing agreement was not effective because of the individual's selfishness and greediness in trying to gain on the other man's honesty.

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11. Charles M. McLennan, "New Year - New Cheer for Citrus Growers," The Florida Grower, Vol. XLV, No. 1, January, 1937, p. 5.
 12. "Fruit Shippers Attack Private Program," The Florida Grower, Vol. XLV, No. 4, April, 1937, p. 8.

The history of marketing agreements in Florida is a hectic one and it seems that the various factions concerned will never be able to agree on just what is the proper procedure. It is a difficult thing to prorate shipments and be fair to all. On the other hand, proration seems absolutely necessary in years of large production in order to control supplies going into the auction and other markets.

One point was brought out at the hearings with which we are in entire accord, and that is that the members of the Florida Citrus Commission should not act as members of the Florida Control Committee. It is entirely too much to ask these men to serve on two bodies, neither of which carries any pay. We believe our citrus laws could be more intelligently handled by a separate body of men.¹³

The factions on both sides seemed to agree that the Florida Citrus Commission should act as an individual unit in all cases.

A foreign market was developing for Florida fruit, a definitely cheerful note among all the other dissension in the industry. Dr. Fred Motz, agricultural commissioner in Europe for the United States Department of Agriculture, felt Florida grapefruit was welcome on any table in Europe.

Expanded grapefruit markets were vitally necessary if a constant increase in production was to continue. The canning of grapefruit juices and sections was consuming over eight and a half million boxes of fresh grapefruit;

13. "Marketing Agreements," The Florida Grower, Vol. XLV, No. 4, April, 1937, p. 22.

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describes the general situation
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nevertheless, other fields were needed to be explored before the full crop was to be used. These basic problems of increased production with no future let-down made it necessary for sound judgment and straight thinking among the growers and shippers. New methods of solving these problems were suggested, such as, control of the distribution of fruit by grade and size, shipments to be prorated by volume, and government purchase of surplus fruit.¹⁴ Whether these three solutions would be any more effective than solutions which had been advanced in previous years can only be seen through a general knowledge of the overall picture.

It was claimed that California was standardizing two varieties of oranges - Valencias and Navels - where Florida had one hundred and fifty-three strains of oranges, including standard varieties of Valencia, Parson Brown, Hamlin, Pineapple, Blood, Temple, and King. It was felt that if Florida would delimit her excessive number of varieties, the consumer could easily recognize the quality in Florida citrus.

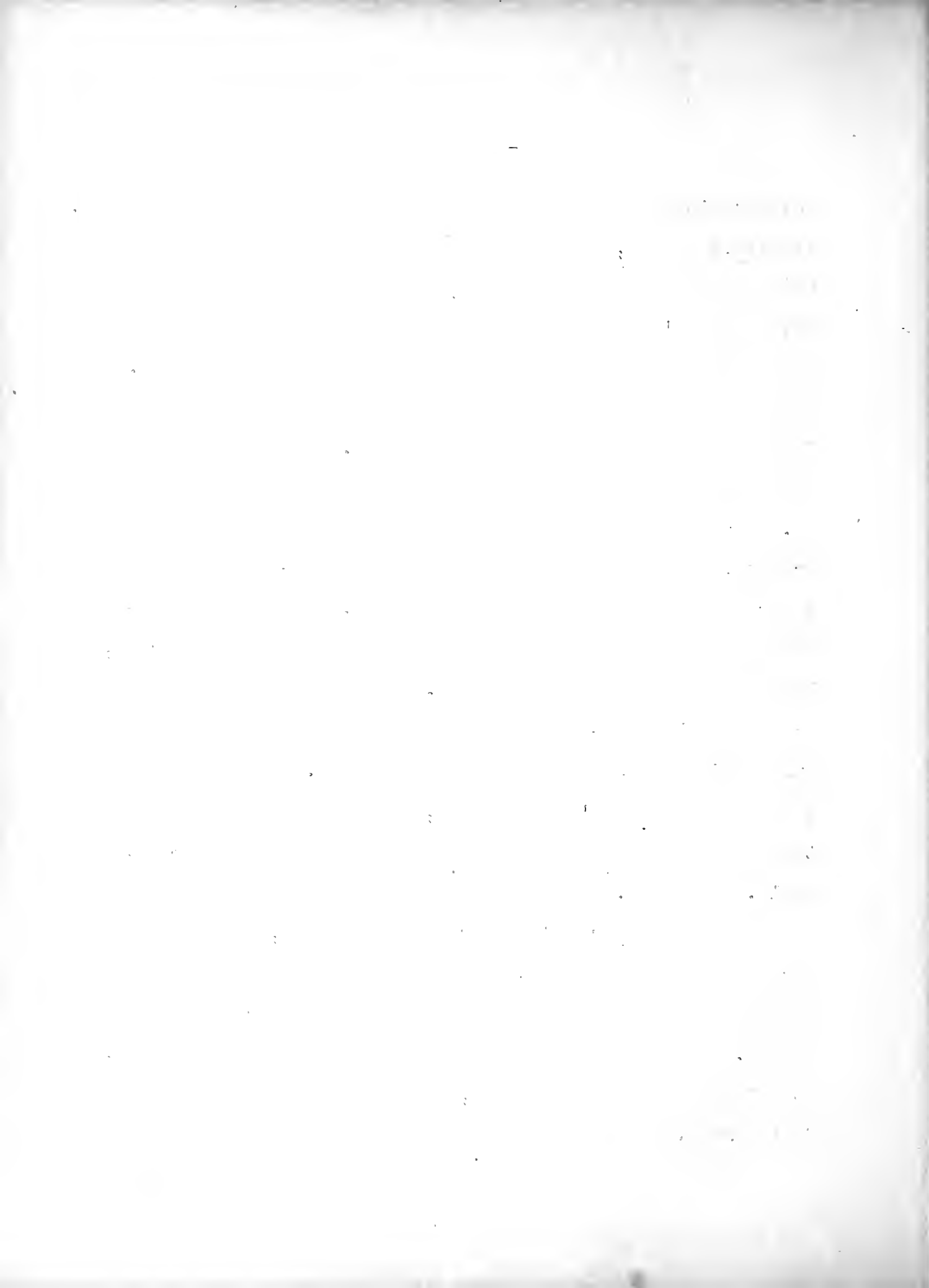
Advertising media including newspapers, radio,

14. "Buys Orange Surplus," The Florida Grower, Vol. XLVI, No. 3, March, 1938, p. 2.

and magazines were used to increase demands for Florida citrus. It was felt that, regardless of how much advertising was used to develop the citrus industry, it was imperative that after the consumer's interest had been developed, he must be satisfied with the quality of the merchandise he had purchased. If Florida were to keep her citrus consumers happy, she must follow through sincerely and faithfully. The citrus industry was finally beginning to awaken to the immense task ahead of it. They were now beginning to see the necessity for a well-trained, competent sales force with the know-how to develop a market for this tremendous production. Canning as a by-product was continuing to take a great surplus of the fruit, but was by no means the solution.

The 1938-1939 Florida grapefruit crop of twenty-one million boxes showed an increase of 43.8 per cent over the previous season's production, and the orange yield of twenty-nine thousand five hundred boxes showed an increase of 10.5 per cent.

As the grapefruit crop grew in size, it became more and more apparent that the grower of this fruit would have to depend to a great extent upon the cannery as his outlet. The fresh fruit market did not seem able to absorb, at a fair price to the grower, any more than first grade fruit and it was also apparent that if they did not band



together and control their distribution in a more intelligent manner, even first grade fruit would not be sold.

The production problem was becoming more and more prominent in the minds of the growers, packers, and shippers as the figures mounted. The chain stores followed through with their suggestion of cooperation by introducing a producer-consumer campaign with growers cooperating with distributors. Retailers suggested a maximum mark-up of 25 per cent above cost and a reduction in common carrier costs, with savings passed on to the consumer in the form of reduced prices. It was also necessary to reduce packaging costs and reduce terminal charges and fees. It was thought that by eliminating third class fruit, the consumer would be more willing to buy what was on the market at somewhat higher prices.



CHAPTER VII

A SURVEY FROM 1940 THROUGH 1949

Europe was now (1940) at war and it was expected that it would not be long before the United States joined in the struggle. The problem of marketing the large amount of citrus being produced in Florida at the beginning of this decade, however, continued to be of major consequence.

The American people, until the attack on Pearl Harbor, were reluctant to go to war. Whether the administration was similarly reluctant seemed doubtful. In any event, nothing served to get us out of the depression, or offered prospect of doing so, until war and our progressive participation in it came along.¹

In 1942 a most extensive governmental price fixing program became effective with the establishment of the Office of Price Administration. The Emergency Price Control Act of January 1942 gave legislative sanction for Government price fixing.

Its opening section reads as follows:

It is hereby declared to be in the interest of the national defense and security and necessary to the effective prosecution of the present war, and the purposes of this Act are, to stabilize prices and to prevent speculative, unwarranted, and abnormal increases in prices; to eliminate and prevent profiteering, hoarding, manipulation, speculation, and other disruptive practices resulting from abnormal market conditions or scarcities caused by or contributing to the national

1. Broadus Mitchell and Louise Pearson Mitchell, American Economic History, p. 893.

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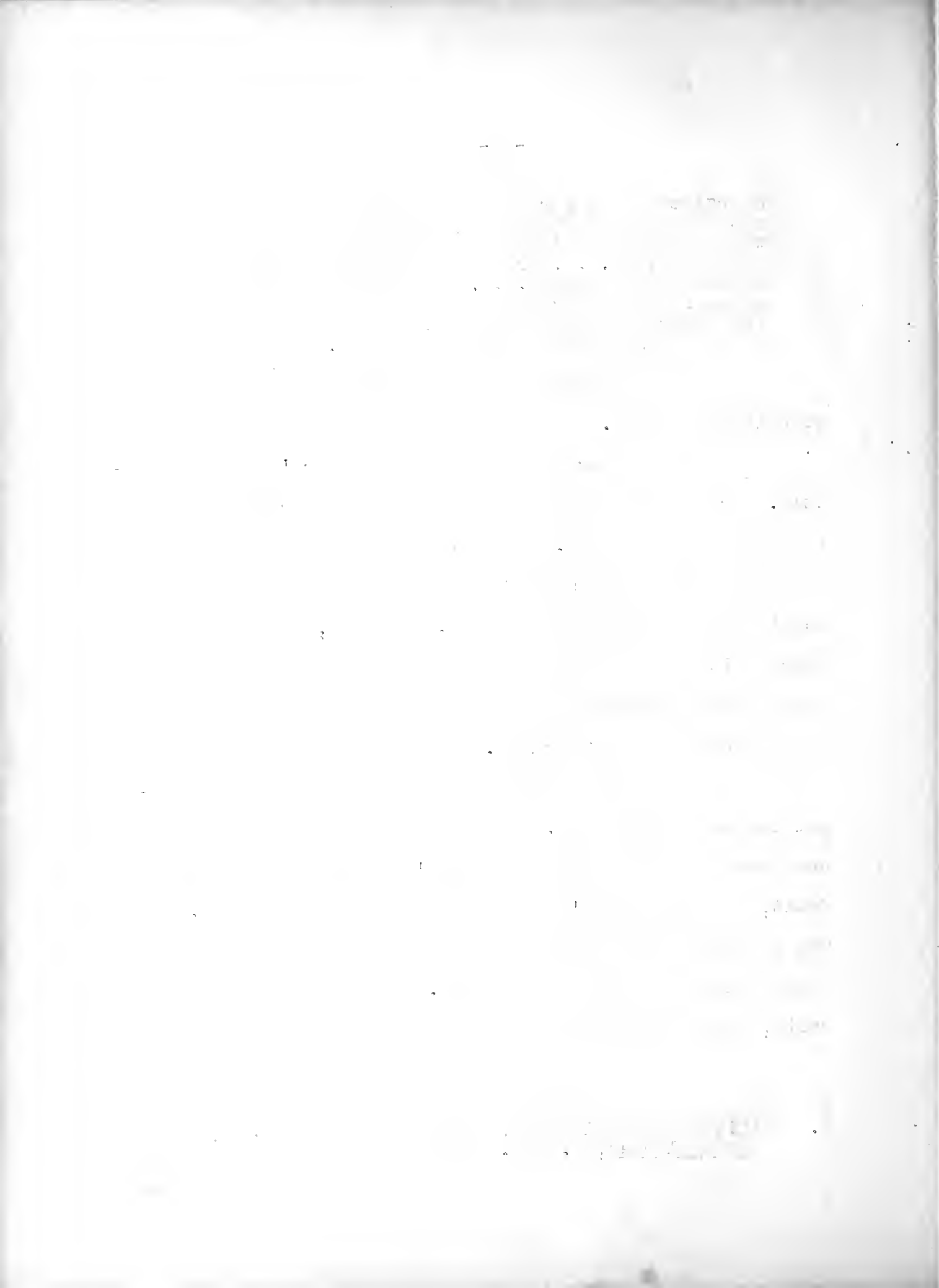
emergency; to assure that defense appropriations are not dissipated by excessive prices; to protect persons with relatively fixed and limited incomes, consumers, wage earners . . . from undue impairment of their standard of living; . . . to stabilize agricultural prices, and to permit voluntary cooperation between the Government and producers, processors, and others to accomplish the aforesaid purposes.²

The above act assisted the citrus industry in stabilizing prices.

The New York market was the country's price barometer. From here flowed the prices which governed the market throughout the country. High grade merchandise, well known on this market for its standards and excellent quality would receive good prices at all times. However, even that great Metropolitan center can be glutted with fruit that would stand a better chance of bringing higher prices if properly distributed in other markets.

The national emergency caused by the war was resulting in higher wages. It was not the concern of the consumer to think about the grower's costs to produce the fruit, or the shipper's costs to get it to the market. It was the concern of the grower and producer to understand his own problems and reduce his costs. By reducing the production costs, the grower would be in a better position to sell his

2. William Henry Keikhofer, Economic Principles, Problems and Policies, p. 476.



product for less. This reduction could be passed on to the consumer. His buying power would be increased by lowering the cost of the product and consequent absorption of the citrus supply.

Much of the increased production was being used in the canning industry. During the season of 1941-1942 approximately 51 per cent of the grapefruit crop was canned. In the same year the canners used almost 4,000,000 field boxes of oranges for juice. The canning industry was making great strides in production and the government was reserving a tremendous amount for its future use. Three concentrate plants were operating in Florida with a combined daily capacity of over 30,000 field boxes of oranges. This product was particularly adaptable to government use for shipping to all parts of the world.³

As the country adjusted itself to the demands of a war economy, the citrus industry was called upon to supply more citrus products. The frozen concentrate was developing under supervision of state and government agencies. The consumer was now able to buy a delicious frozen citrus concentrate which, when mixed with water, would give him four

3. V. V. Bowman, "Florida Citrus Goes to War in Tin Armour," The Florida Grower, Vol. LI, No. 3, March, 1943, p. 5.

times the quantity he purchased.⁴

During the citrus season of 1944-1945, production increased to about 70,000,000 boxes.⁵ This tremendous production was "supported by continued unequalled Government purchases of nearly the equivalent of fifteen million cases."⁶

The Florida Citrus Commission worked closely with government agencies and representatives of other citrus producing areas. During the year 1944 they were instrumental in establishing higher prices for both fresh and canned citrus. The commission also worked out a subsidy program with the War Food Administration, resulting in the grower obtaining approximately fifty-nine cents per box more for his fruit than he would have received under the ceiling price.

With the end of the war in 1945 the Florida citrus industry was again faced with its old problems. The grower had invested a large amount of the profits made in the war years into new citrus plantings. These plantings would

4. A. L. Stahl, "For Sale: Fresh Florida Orange Juice All Year," The Florida Grower, Vol. LII, No. 6, June, 1944, p. 5.

5. Florida Department of Agriculture, Citrus Industry in Florida, 1947, p. 12.

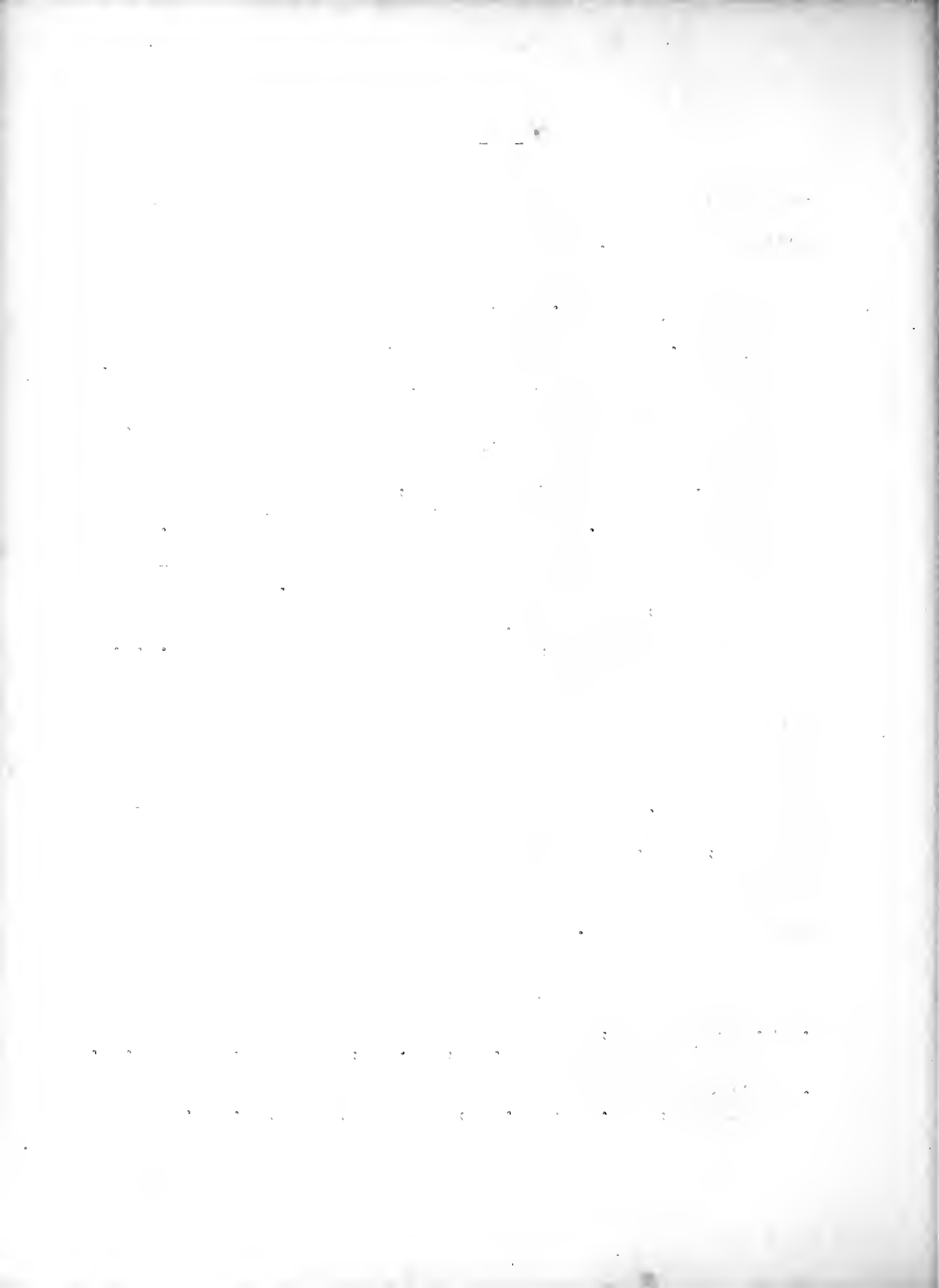
6. H. F. Willson, "Marketing Florida Citrus - Review of 1944-45 Season," The Citrus Industry, Vol. 26, No. 7, July, 1945, p. 9.

eventually bear fruit and would increase the present production many times. It was stated in 1947 that

The basic problem is the rapidly expanding production of citrus. This fact confronts us at almost every point in developing a satisfactory marketing program. In the last ten years, the production of citrus fruit in the United States has more than doubled. In Florida during that period, the production of oranges has increased by approximately 200 per cent, and the per cent increase for grapefruit has been almost as great. Going back twenty years, citrus production in the United States has increased over three and one-half times. In that 20-year period, the production of Florida oranges has increased from 11 million boxes annually to 52.7 million for the season just ended. The expansion in grapefruit output in Florida has gone from an approximately 8 million boxes for the 1926-27 season to 30 million for the past season. As you are all aware, the expansion has been particularly rapid in the past few years. Even when one allows for poorer cultural practices, the trend still points upward . . .⁷

The production and marketing administration of the United States Department of Agriculture approved substantially tighter Federal grading standards for Florida oranges and grapefruit. These new standards became effective September 30, 1947. By raising the standards of Florida citrus it was generally believed in the industry that better markets would result.⁸

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7. J. Wayne Reitz, "The Future of Citrus Marketing," The Citrus Industry, Vol. 28, No. 11, November, 1947, p. 5.
 8. "Grade Standards for Citrus Approved," The Citrus Industry, Vol. 28, No. 11, November, 1947, p. 12.



The year 1948 developed into one of the worst years in the history of the citrus industry. A group of interested parties suggested forming a new cooperative, The Florida Citrus Mutual. Here was another panacea which might or might not solve the problems of the industry. The Florida Citrus Mutual was organized

. . . to promote and provide a medium for the cooperative unity of effort by producers of citrus fruit in the handling and marketing of same and any and all derivatives and products thereof; to effect economies and reduce waste in relation thereto and to do anything that is conducive to the policy of Congress of the United States as stated in the Agricultural Marketing Act and amendments thereto.⁹

During the season of 1948-1949 the Marshall Plan, more commonly known as the Economic Cooperation Administration, did much to assist the exporter of Florida citrus. The plan functioned as follows: In seventeen European countries which had been affected by the second World War, the E.C.A. had set up a method of purchasing economic needs brought about by the war. It was the purpose of the Marshall Plan to assist these countries back to their normal economy with funds derived from the United States and, at the same time, guarantee these funds being used for purchases made of United States products. Citrus was included in the plan for

9. Florida Citrus Mutual, Charter - By-Laws, p. 1.

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Switzerland and Belgium through normal channels of trade, whereas it was included in France, Holland, and England through governmental agencies set up to purchase these countries' needs. In the citrus industry a subsidy of 25 per cent was set aside by the United States government to encourage foreign buyers to purchase Florida citrus. If a foreign buyer found he could buy citrus at three quarters of its market price in the United States, it was believed he would take advantage of this opportunity and thereby consume a good portion of Florida's overproduction.¹⁰ The plan worked well and thousands of boxes of Florida oranges and grapefruit, together with many thousands of cans of citrus juices and concentrate flowed into foreign markets.

10. "How to do Business Under the Marshall Plan," reprinted from the Kiplinger Magazine, May, 1948, pp. 5-16.



CHAPTER VIII

CONCLUSION, SUMMARY, AND RECOMMENDATIONS

This historical study has shown the weaknesses in the marketing structure of Florida's citrus industry. From the establishment of the Florida Citrus Exchange in 1909 to the appointment of the Florida Citrus Commission in 1935 and the organization of the Citrus Mutual in 1948 there has been a constant struggle in the industry to market the citrus produced.

The Florida Citrus Exchange was formed as a marketing agency and failed because the people in the industry did not agree with its policies. Before the Florida Citrus Commission was appointed by the state in 1935, there had been a series of marketing groups inaugurated including the Orlando Perishable Traffic League of 1923, the Fruitman's Club of the same year and the Clearing House of 1928. These were all started because the industry felt the need for a controlling body to pass on marketing problems. They failed because they could not establish cooperation within the industry.

The depression of the 1930's developed the need for governmental control and resulted in the Florida Citrus Commission. It was soon apparent there were many in the

industry who resented too much governmental control and the Commission was required to relinquish some of its original powers.

World War II pulled the citrus industry out of the depression and until two years after the war was over Florida felt no great need for marketing assistance. However, the post-war recession again developed the necessity for better organization and cooperation in the industry. It is now more apparent than ever before that Florida is faced with greater problems than she has ever been called upon to face before.

The basic problem which faces the Florida citrus industry is its rapidly expanding production. Consumer buying power cannot absorb present citrus production through the usual channels of distribution. The problem is one of properly allocating these supplies in accordance with the present demand, keeping in mind future demand and expansion. If growers are to receive continuous profitable returns, the regular market channels must be relieved through the development of foreign markets and those markets which do not receive a continuous flow of citrus.

Quality is a second problem continually facing the industry. Under present supply conditions, it is absolutely essential, if we are to expand our market, to provide the

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consumer with a better quality product than is now customary. This applies particularly to the internal quality of our fresh and processed fruit. Nature puts certain limitations on how far this may be carried from a practical standpoint, but through careful research there is much room for improvement. Equally important is the need to reduce the great amount of decay which develops in fresh fruit. This aspect of the quality problem may be improved through careful handling and closer supervision in the packing house.

Better distribution is a third problem. This does not necessarily mean changing the amounts going to each market, but rather that better distribution be obtained within all the regions in which citrus is marketed. More adequate and continuous supplies in the smaller cities and rural areas is necessary. Better balance of supplies among the larger terminal markets is needed in the day-to-day market movements.

Disorderly marketing or lack of coordination in selling and distribution presents a fourth problem. More than 300 fresh fruit sales organizations and over fifty canning plants handle Florida citrus. Under such a system, uncontrolled shipments and unnecessary price cutting often result. There is no coordination in shipments and in selling. Markets become flooded with fruit, prices decrease and

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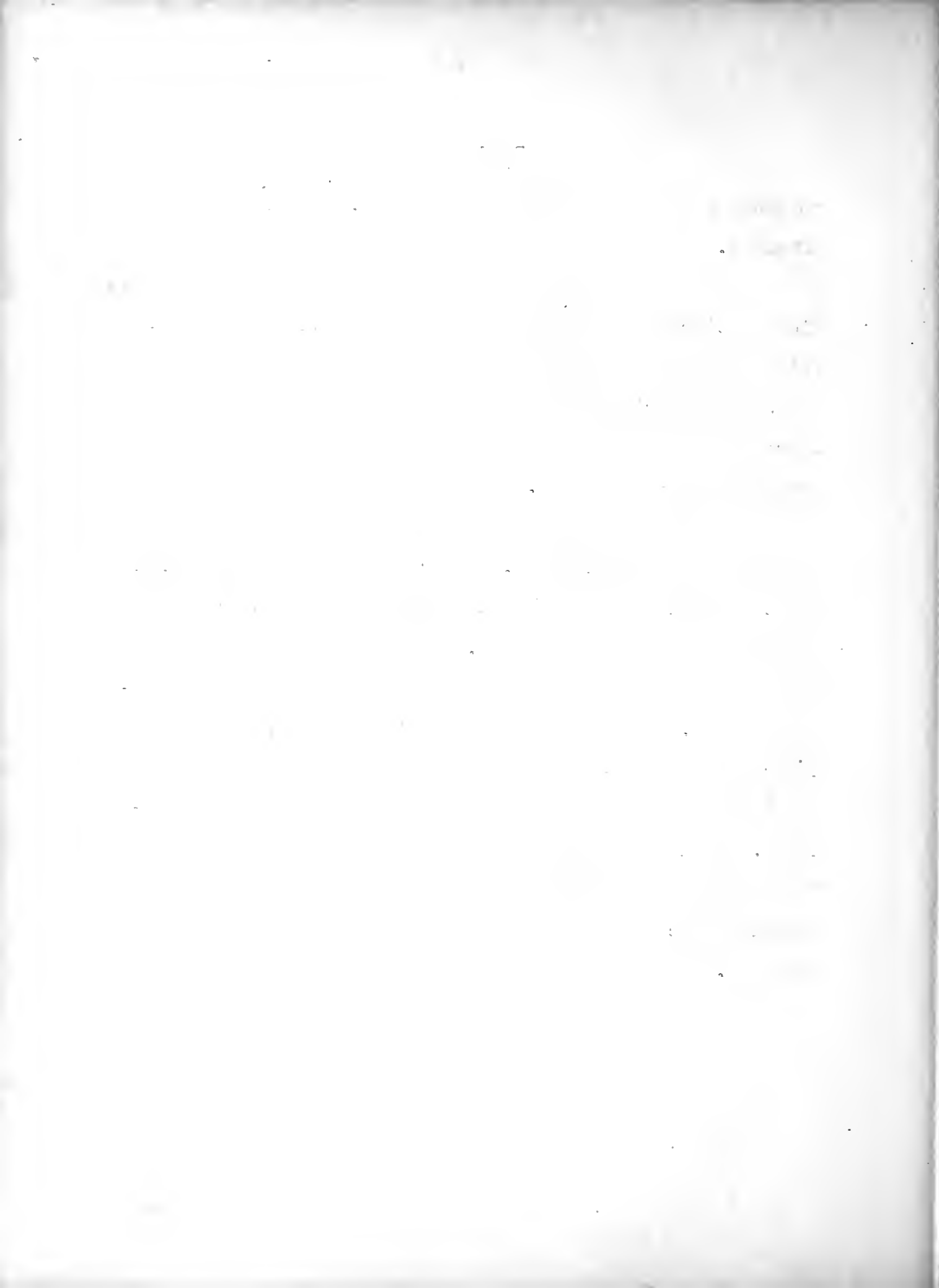
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not only the immediate market concerned, but all markets are affected.

A final problem is that of expanding the consumption of citrus through present and prospective consumers. This involves continuing and improving our program of advertising and nutritional education to the end that present users of fresh and canned citrus have a real desire to increase their consumption.

All of the above problems may be solved only through industry-wide organization. It is only through organization and cooperation in the industry that improvements can be made to handle these problems. The industry must recognize the need in Florida for education in primary citrus marketing methods. Florida is an agricultural state. It is imperative that those dependent upon her citrus industry should know how to develop it to the peak of its possibilities. It is only through education and application of fundamental principles of sound marketing procedure that the Florida citrus industry will ever be able to handle its problems.



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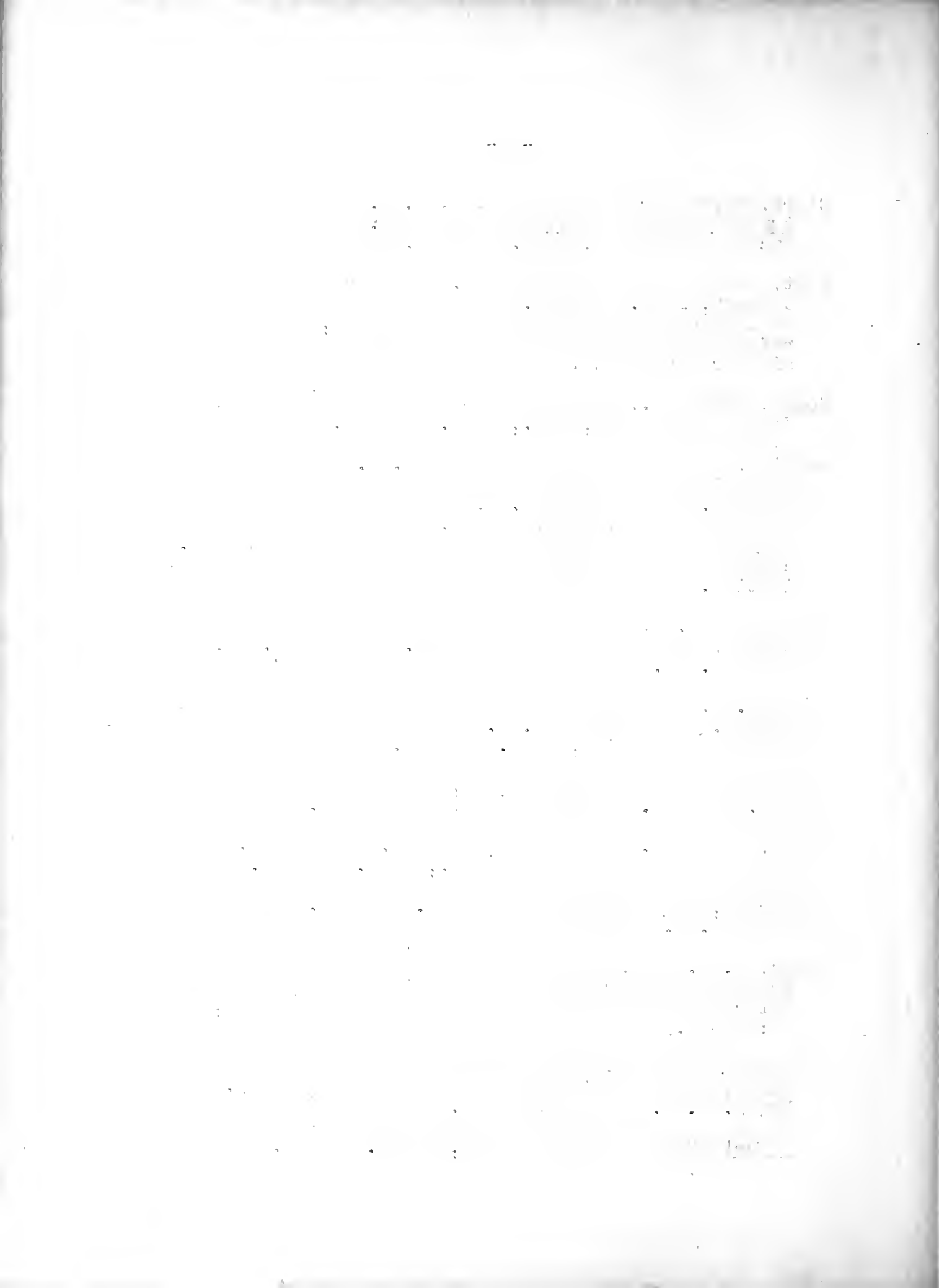
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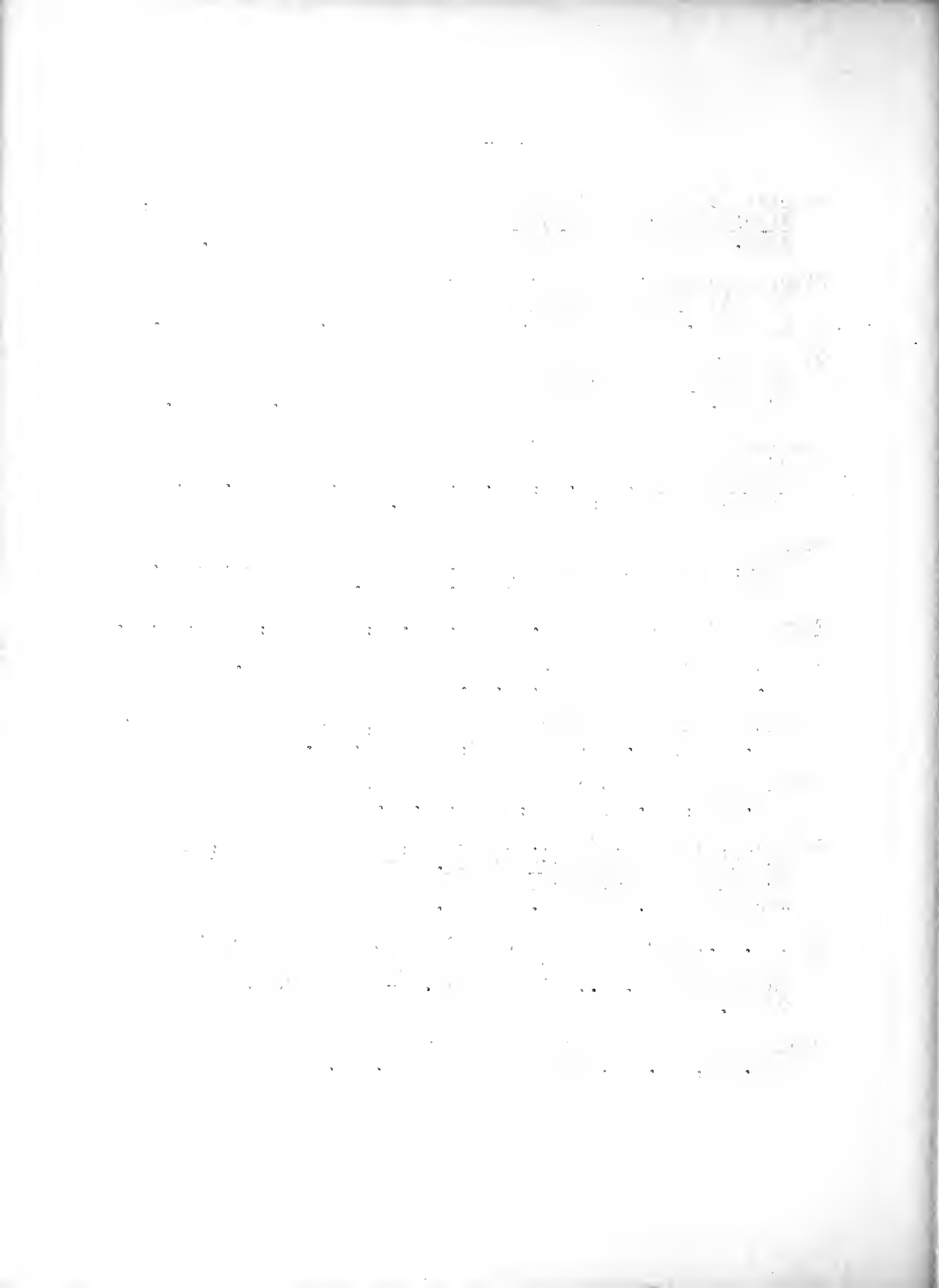
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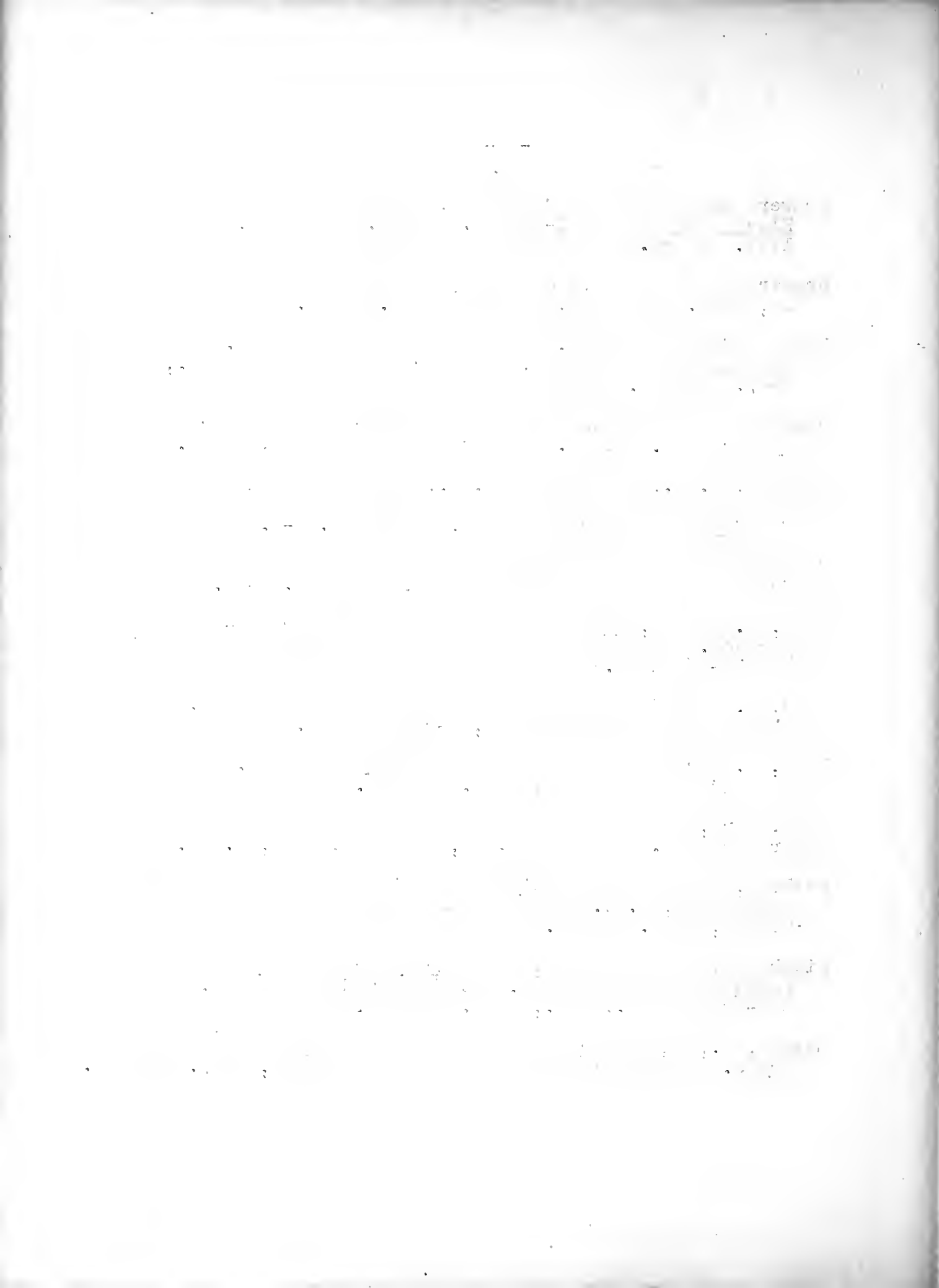
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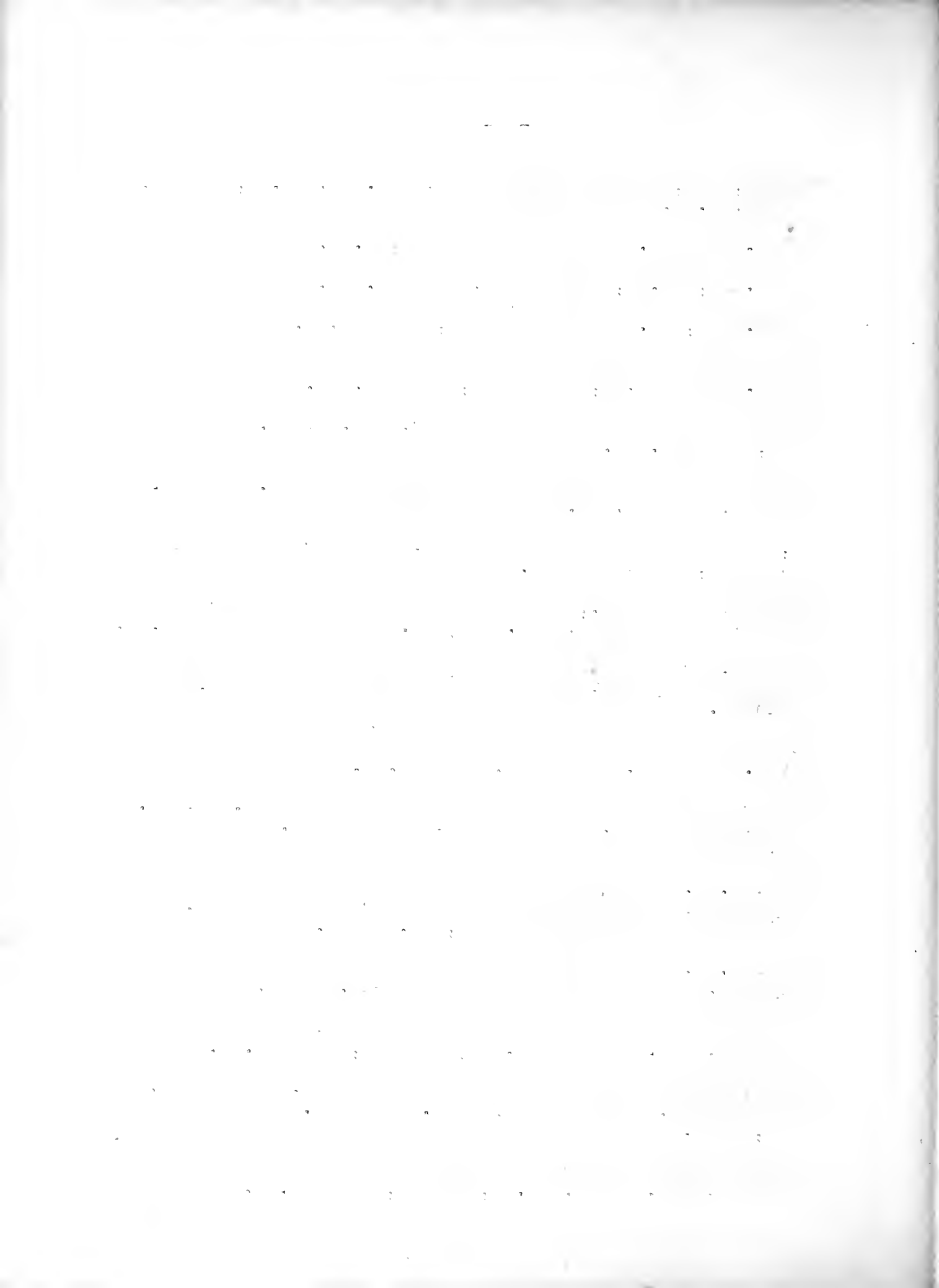
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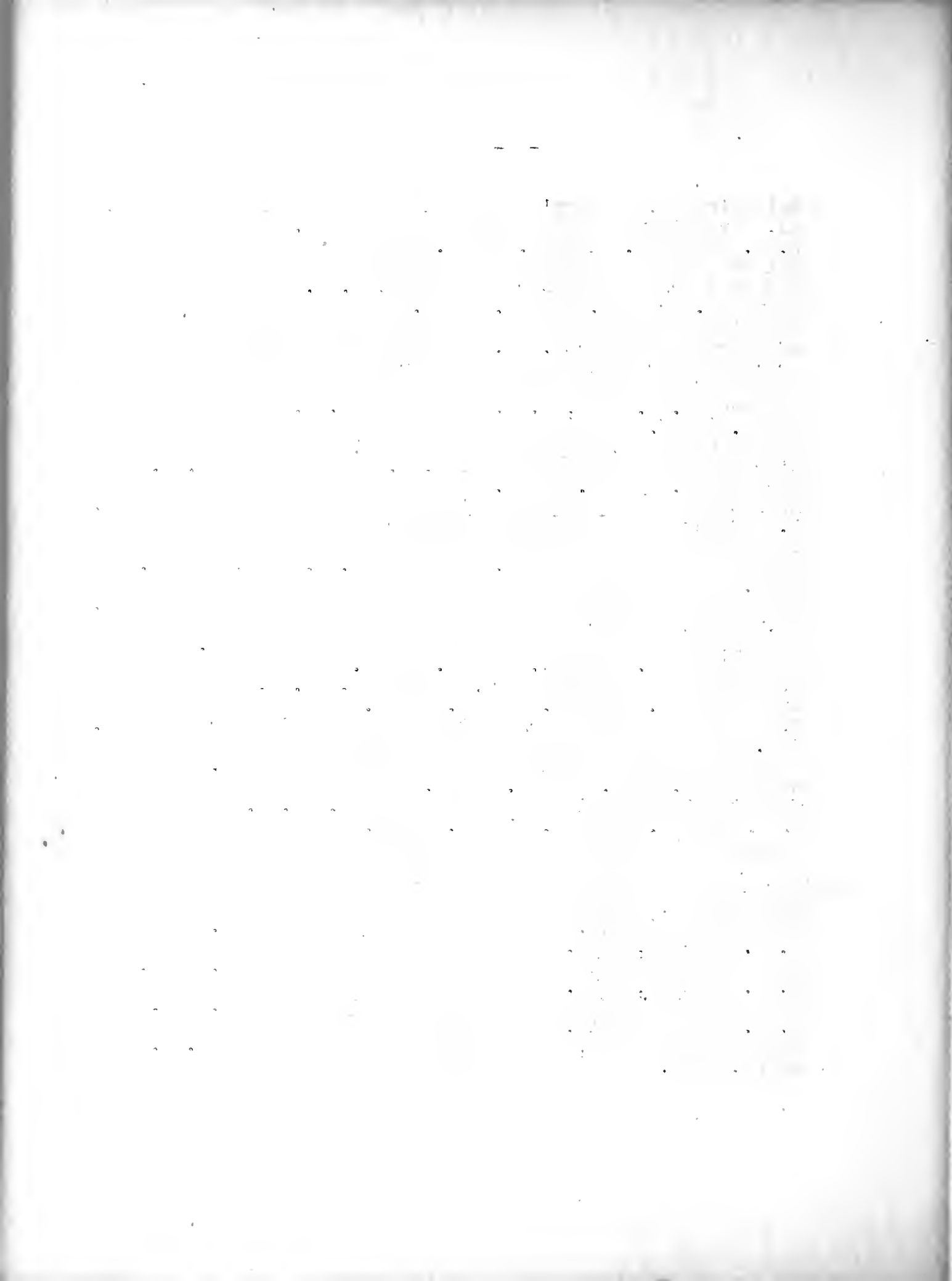
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APPENDIX

SPECIAL INDEX USED FOR INFORMATION OBTAINED FROM
THE FLORIDA GROWER

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
6	5	May 4	1912
6	9	June 1	1912
6	10	June 8	1912
6	15	July 13	1912
6	17	July 27	1912
6	19	August 10	1912
6	21	August 24	1912
7	2	October 12	1912
7	4	October 26	1912
7	6	November 9	1912
7	7	November 16	1912
7	11	December 14	1912
XII	2	May 29	1915
XIV	4	July 22	1916
XV	4	January 27	1917
XV	21	May 26	1917
XV	22	June 2	1917
XV	23	June 9	1917
XV	24	June 16	1917
XVI	6	August 11	1917
XVI	13	September 29	1917
XVI	14	October 6	1917
XVI	19	November 10	1917
XVI	20	November 17	1917
XVI	25	December 22	1917
XVII	1	January 5	1918
XVII	14	April 6	1918
XVII	17	April 27	1918
XVII	21	May 25	1918
XVII	23	June 8	1918
XVII	25	June 22	1918
XVIII	1	July 6	1918
XVIII	2	July 13	1918
XVIII	6	August 10	1918
XVIII	10	September 7	1918
XIX	14	April 5	1919
XIX	15	April 12	1919
XIX	16	April 19	1919
XIX	17	April 26	1919
XIX	18	May 3	1919
XIX	23	June 7	1919
XIX	26	June 28	1919

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XX	8	August 23	1919
XX	11	September 13	1919
XX	15	October 11	1919
XX	18	November 1	1919
XXI	1	January 3	1920
XXI	2	January 10	1920
XXI	3	January 17	1920
XXI	8	February 21	1920
XXI	9	February 28	1920
XXI	10	March 6	1920
XXI	11	March 13	1920
XXI	12	March 20	1920
XXI	14	April 3	1920
XXI	15	April 10	1920
XXI	16	April 17	1920
XXI	17	April 24	1920
XXI	18	May 1	1920
XXI	19	May 8	1920
XXI	20	May 15	1920
XXI	21	May 22	1920
XXI	22	May 29	1920
XXI	23	June 5	1920
XXI	24	June 12	1920
XXI	25	June 19	1920
XXII	1	July 3	1920
XXII	2	July 10	1920
XXII	4	July 24	1920
XXII	5	July 31	1920
XXII	6	August 7	1920
XXII	7	August 14	1920
XXII	8	August 21	1920
XXII	9	August 28	1920
XXII	11	September 11	1920
XXII	12	September 18	1920
XXII	13	September 25	1920
XXII	14	October 2	1920
XXII	15	October 9	1920
XXII	16	October 16	1920
XXII	17	October 23	1920
XXII	18	October 30	1920
XXII	19	November 6	1920
XXII	20	November 13	1920
XXII	21	November 20	1920
XXII	22	November 27	1920
XXII	23	December 4	1920

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXII	25	December 18	1920
XXII	26	December 25	1920
XXIII	1	January 1	1921
XXIII	2	January 8	1921
XXIII	3	January 15	1921
XXIII	4	January 22	1921
XXIII	5	January 29	1921
XXIII	6	February 5	1921
XXIII	7	February 12	1921
XXIII	8	February 19	1921
XXIII	9	February 26	1921
XXIII	10	March 5	1921
XXIII	11	March 12	1921
XXIII	12	March 19	1921
XXIII	13	March 26	1921
XXIII	14	April 2	1921
XXIII	15	April 9	1921
XXIII	16	April 16	1921
XXIII	17	April 23	1921
XXIII	18	April 30	1921
XXIII	19	May 7	1921
XXIII	20	May 14	1921
XXIII	21	May 21	1921
XXIII	22	May 28	1921
XXIII	23	June 4	1921
XXIII	24	June 11	1921
XXIII	25	June 18	1921
XXIII	26	June 25	1921
XXV	1	January 7	1922
XXV	2	January 14	1922
XXV	4	January 28	1922
XXV	6	February 11	1922
XXV	7	February 18	1922
XXV	8	February 25	1922
XXV	9	March 4	1922
XXV	10	March 11	1922
XXV	11	March 18	1922
XXV	12	March 25	1922
XXV	13	April 1	1922
XXV	14	April 8	1922
XXV	15	April 15	1922
XXV	17	April 29	1922
XXV	18	May 6	1922
XXV	19	May 13	1922
XXV	20	May 20	1922

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXV	21	May 27	1922
XXV	22	June 3	1922
XXV	23	June 10	1922
XXV	24	June 17	1922
XXV	25	June 24	1922
XXVI	1	July 1	1922
XXVI	2	July 8	1922
XXVI	3	July 15	1922
XXVI	4	July 22	1922
XXVI	5	July 29	1922
XXVI	6	August 5	1922
XXVI	7	August 12	1922
XXVI	8	August 19	1922
XXVI	9	August 26	1922
XXVI	10	September 2	1922
XXVI	11	September 9	1922
XXVI	12	September 16	1922
XXVI	13	September 23	1922
XXVI	14	September 30	1922
XXVI	16	October 14	1922
XXVI	17	October 21	1922
XXVI	20	November 11	1922
XXVI	21	November 18	1922
XXVI	22	November 25	1922
XXVI	25	December 16	1922
XXVI	26	December 23	1922
XXVI	27	December 30	1922
XXVII	1	January 6	1923
XXVII	2	January 13	1923
XXVII	3	January 20	1923
XXVII	4	January 27	1923
XXVII	5	February 3	1923
XXVII	6	February 10	1923
XXVII	7	February 17	1923
XXVII	8	February 24	1923
XXVII	9	March 3	1923
XXVII	10	March 10	1923
XXVII	11	March 17	1923
XXVII	12	March 24	1923
XXVII	13	March 31	1923
XXVII	14	April 7	1923
XXVII	15	April 14	1923
XXVII	16	April 21	1923
XXVII	17	April 28	1923
XXVII	18	May 5	1923

1871
The following are the names of the persons who have been
admitted to the membership of the Society since the last
meeting of the Executive Committee.

1872
The following are the names of the persons who have been
admitted to the membership of the Society since the last
meeting of the Executive Committee.

1873
The following are the names of the persons who have been
admitted to the membership of the Society since the last
meeting of the Executive Committee.

1874
The following are the names of the persons who have been
admitted to the membership of the Society since the last
meeting of the Executive Committee.

1875
The following are the names of the persons who have been
admitted to the membership of the Society since the last
meeting of the Executive Committee.

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXVII	19	May 12	1923
XXVII	20	May 19	1923
XXVII	21	May 26	1923
XXVII	22	June 2	1923
XXVII	23	June 9	1923
XXVII	24	June 16	1923
XXVII	25	June 23	1923
XXVII	26	June 30	1923
XXVIII	1	July 7	1923
XXVIII	2	July 14	1923
XXVIII	3	July 21	1923
XXVIII	4	July 28	1923
XXVIII	5	August 4	1923
XXVIII	6	August 11	1923
XXVIII	7	August 18	1923
XXVIII	8	August 25	1923
XXVIII	9	September 1	1923
XXVIII	10	September 8	1923
XXVIII	11	September 15	1923
XXVIII	12	September 22	1923
XXVIII	13	September 29	1923
XXVIII	14	October 6	1923
XXVIII	15	October 13	1923
XXVIII	16	October 20	1923
XXVIII	17	October 27	1923
XXVIII	18	November 3	1923
XXVIII	19	November 10	1923
XXVIII	20	November 17	1923
XXVIII	21	November 24	1923
XXVIII	22	December 1	1923
XXVIII	23	December 8	1923
XXVIII	24	December 15	1923
XXVIII	25	December 22	1923
XXVIII	26	December 29	1923
XXIX	1	January 5	1924
XXIX	2	January 12	1924
XXIX	3	January 19	1924
XXIX	5	February 2	1924
XXIX	6	February 9	1924
XXIX	7	February 16	1924
XXIX	8	February 23	1924
XXIX	9	March 1	1924
XXIX	10	March 8	1924
XXIX	11	March 15	1924
XXIX	12	March 22	1924

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXIX	13	March 29	1924
XXIX	14	April 5	1924
XXIX	15	April 12	1924
XXIX	16	April 19	1924
XXIX	17	April 26	1924
XXIX	18	May 3	1924
XXIX	19	May 10	1924
XXIX	20	May 17	1924
XXIX	21	May 24	1924
XXIX	23	June 7	1924
XXIX	24	June 14	1924
XXIX	25	June 21	1924
XXIX	26	June 28	1924
XXX	1	July 5	1924
XXX	2	July 12	1924
XXX	3	July 19	1924
XXX	4	July 26	1924
XXX	5	August 2	1924
XXX	6	August 9	1924
XXX	7	August 16	1924
XXX	8	August 23	1924
XXX	9	August 30	1924
XXX	10	September 6	1924
XXX	11	September 13	1924
XXX	12	September 20	1924
XXX	13	September 27	1924
XXX	14	October 4	1924
XXX	15	October 11	1924
XXX	16	October 18	1924
XXX	17	October 25	1924
XXX	18	November 1	1924
XXX	19	November 8	1924
XXX	20	November 15	1924
XXX	21	November 22	1924
XXX	22	November 29	1924
XXX	23	December 6	1924
XXX	24	December 13	1924
XXX	25	December 20	1924
XXX	26	December 27	1924
XXXI	2	January 10	1925
XXXI	4	January 24	1925
XXXI	5	January 31	1925
XXXI	7	February 14	1925
XXXI	8	February 21	1925
XXXI	9	February 28	1925

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXXI	11	March 14	1925
XXXI	13	March 28	1925
XXXI	14	April 4	1925
XXXI	15	April 11	1925
XXXI	16	April 18	1925
XXXI	19	May 9	1925
XXXI	20	May 16	1925
XXXI	21	May 23	1925
XXXI	22	May 30	1925
XXXI	23	June 6	1925
XXXI	24	June 13	1925
XXXI	25	June 20	1925
XXXI	26	June 27	1925
XXXII	1	July 4	1925
XXXII	2	July 11	1925
XXXII	3	July 18	1925
XXXII	4	July 25	1925
XXXII	5	August 1	1925
XXXII	6	August 8	1925
XXXII	7	August 15	1925
XXXII	8	August 22	1925
XXXII	9	August 29	1925
XXXII	10	September 5	1925
XXXII	11	September 12	1925
XXXII	12	September 19	1925
XXXII	13	September 26	1925
XXXII	14	October 3	1925
XXXII	15	October 10	1925
XXXII	16	October 17	1925
XXXII	17	October 24	1925
XXXII	18	October 31	1925
XXXII	19	November 7	1925
XXXII	20	November 14	1925
XXXII	21	November 21	1925
XXXII	22	November 28	1925
XXXII	23	December 5	1925
XXXII	24	December 12	1925
XXXII	25	December 19	1925
XXXII	26	December 26	1925
XXXIII	1	January 2	1926
XXXIII	2	January 9	1926
XXXIII	3	January 16	1926
XXXIII	4	January 23	1926
XXXIII	5	January 30	1926
XXXIII	6	February 6	1926

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXXIII	7	February 13	1926
XXXIII	8	February 20	1926
XXXIII	9	February 27	1926
XXXIII	10	March 6	1926
XXXIII	11	March 13	1926
XXXIII	12	March 20	1926
XXXIII	13	March 27	1926
XXXIII	14	April 3	1926
XXXIII	15	April 10	1926
XXXIII	16	April 17	1926
XXXIII	17	April 24	1926
XXXIII	18	May 1	1926
XXXIII	20	May 15	1926
XXXIII	21	May 22	1926
XXXIII	22	May 29	1926
XXXIII	23	June 5	1926
XXXIII	24	June 12	1926
XXXIII	25	June 19	1926
XXXIII	26	June 26	1926
XXXIV	1	July 3	1926
XXXIV	2	July 10	1926
XXXIV	3	July 17	1926
XXXIV	4	July 24	1926
XXXIV	5	July 31	1926
XXXIV	6	August 7	1926
XXXIV	8	August 21	1926
XXXIV	9	August 28	1926
XXXIV	10	September 4	1926
XXXIV	11	September 11	1926
XXXIV	12	September 18	1926
XXXIV	13	September 25	1926
XXXIV	14	October 2	1926
XXXIV	15	October 9	1926
XXXIV	16	October 16	1926
XXXIV	17	October 23	1926
XXXIV	18	October 30	1926
XXXIV	19	November 6	1926
XXXIV	20	November 13	1926
XXXIV	21	November 20	1926
XXXIV	22	November 27	1926
XXXIV	23	December 4	1926
XXXIV	24	December 11	1926
XXXIV	25	December 18	1926
XXXIV	26	December 25	1926
XXXV	1	January 1	1927
XXXV	2	January 8	1927



<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXXV	3	January 15	1927
XXXV	4	January 22	1927
XXXV	5	January 29	1927
XXXV	6	February 5	1927
XXXV	7	February 12	1927
XXXV	8	February 19	1927
XXXV	9	February 26	1927
XXXV	10	March	1927
XXXV	11	April	1927
XXXV	12	May	1927
XXXV	13	June	1927
XXXV	14	July	1927
XXXV	15	August	1927
XXXV	16	September	1927
XXXV	17	October	1927
XXXV	18	November	1927
XXXV	19	December	1927
XXXVI	1	January	1928
XXXVI	2	February	1928
XXXVI	3	March	1928
XXXVI	4	April	1928
XXXVI	5	May	1928
XXXVI	6	June	1928
XXXVI	7	July	1928
XXXVI	8	August	1928
XXXVI	9	September	1928
XXXVI	10	October	1928
XXXVI	11	November	1928
XXXVI	12	December	1928
XXXVII	1	January	1929
XXXVII	2	February	1929
XXXVII	3	March	1929
XXXVII	4	April	1929
XXXVII	5	May	1929
XXXVII	6	June	1929
XXXVII	7	July	1929
XXXVII	8	August	1929
XXXVII	9	September	1929
XXXVII	10	October	1929
XXXVII	11	November	1929
XXXVII	12	December	1929
XXXVIII	3	March	1930
XXXVIII	4	April	1930
XXXVIII	5	May	1930

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XXXVIII	6	June	1930
XXXVIII	7	July	1930
XXXVIII	8	August	1930
XXXVIII	9	September	1930
XXXVIII	10	October	1930
XXXVIII	11	November	1930
XXXVIII	12	December	1930
XXXIX	1	January	1931
XXXIX	2	February	1931
XXXIX	3	March	1931
XXXIX	4	April	1931
XXXIX	5	May	1931
XXXIX	6	June	1931
XXXIX	7	July	1931
XXXIX	8	August	1931
XXXIX	9	September	1931
XXXIX	10	October	1931
XXXIX	11	November	1931
XXXIX	12	December	1931
XL	1	January	1932
XL	2	February	1932
XL	3	March	1932
XL	4	April	1932
XL	5	May	1932
XL	6	June	1932
XL	7	July	1932
XL	8	August	1932
XL	9	September	1932
XL	10	October	1932
XL	11	November	1932
XL	12	December	1932
XLI	1	January	1933
XLI	2	February	1933
XLI	3	March	1933
XLI	4	April	1933
XLI	5	May	1933
XLI	6	June-July	1933
XLI	7	Aug.-Sept.	1933
XLI	8	Oct.-Nov.	1933
XLII	1	December-	1933
XLII	1	January	1934
XLII	2	February	1934
XLII	3	March-April	1934
XLII	4	May	1934
XLII	5	June-July	1934

<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XLII	6	August	1934
XLII	7	September	1934
XLII	8	October	1934
XLII	9	November	1934
XLII	10	December	1934
XLIII	1	January	1935
XLIII	2	February	1935
XLIII	3	March	1935
XLIII	4	April	1935
XLIII	5	May	1935
XLIII	6	June	1935
XLIII	7	July	1935
XLIII	8	September	1935
XLIII	9	October	1935
XLIII	10	November	1935
XLIII	11	December	1935
XLV	1	January	1936
XLV	2	February	1936
XLV	3	March	1936
XLIV	4	April	1936
XLIV	5	May	1936
XLIV	6	June	1936
XLIV	7	July	1936
XLIV	8	August	1936
XLIV	9	September	1936
XLIV	10	October	1936
XLIV	11	November	1936
XLIV	12	December	1936
XLV	1	January	1937
XLV	2	February	1937
XLV	3	March	1937
XLV	4	April	1937
XLV	5	May	1937
XLV	6	June	1937
XLV	7	July	1937
XLV	8	August	1937
XLV	9	September	1937
XLV	10	October	1937
XLV	11	November	1937
XLV	12	December	1937
XLVI	1	January	1938
XLVI	2	February	1938
XLVI	3	March	1938
XLVI	4	April	1938
XLVI	5	May	1938



<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
XLVI	6	June	1938
XLVI	7	July	1938
XLVI	9	September	1938
XLVI	10	October	1938
XLVI	12	December	1938
XLVII	2	February	1939
XLVII	3	March	1939
XLVII	4	April	1939
XLVII	7	July	1939
XLVII	10	October	1939
XLVII	11	November	1939
XLVII	12	December	1939
XLVIII	4	April	1940
XLVIII	5	May	1940
XLVIII	7	July	1940
XLVIII	8	August	1940
XLVIII	10	October	1940
XLVIII	11	November	1940
XLVIII	12	December	1940
XLIX	2	February	1941
XLIX	3	March	1941
XLIX	5	May	1941
XLIX	6	June	1941
XLIX	7	July	1941
XLIX	8	August	1941
XLIX	10	October	1941
XLIX	11	November	1941
XLIX	12	December	1941
L	3	March	1942
L	5	May	1942
L	6	June	1942
L	8	August	1942
L	12	December	1942
LI	4	April	1943
LI	9	September	1943
LI	10	October	1943
LI	11	November	1943
LII	6	June	1944
LII	8	August	1944
LII	11	November	1944
LII	12	December	1944
LIII	1	January	1945
LIII	2	February	1945
LIII	3	March	1945
LIII	4	April	1945



<u>Volume</u>	<u>Number</u>	<u>Date</u>	<u>Year</u>
LV	6	June	1947
LV	8a	August	1947
LV	9a	September	1947
LV	10a	October	1947
LV	11a	November	1947
LV	12a	December	1947
LVI	2a	February	1948
LVI	3a	March	1948
LVI	4a	April	1948
LVI	5a	May	1948
LVI	6a	June	1948
LVI	7a	July	1948
LVI	8a	August	1948
LVI	9	September	1948
LVI	10	October	1948
LVI	11	November	1948
LVI	12	December	1948



Date Due

JUN 29



